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Information Technology Infrastructure (ITI)  
Middleware Support Services Section (MSSS)



Automated Enrollment  
External User Guide

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# 1. Introduction

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## 1.1. Purpose and Scope

The purpose of this document is to describe the User Interface (UI) for the Automated Enrollment (AE) Application. The AE application provides authorized delegated users the ability to enroll and update Application System IDs (ASID) using the Registered User Portal (RUP) Portal.

This guide is not intended to be tutorial on the design of the AE application. It does not discuss any administrative aspects of the AE application. This guide does not discuss how to use the application other than those aspects that the user needs to know in order to use the AE application.

The Scope is limited to the description of the current functionality of the AE application that is available to the end user as of the publication of this document.

## 1.2. Background

This guide was developed to provide the authorized delegated user of the AE application with guidance on how to use the application. The end user will access the AE application after successfully logging in to the RUP Portal. In order to login to the RUP portal, the authorized delegated user must have a valid user ID and password.

## 1.3. Audience

The audiences are the end users of the AE application. This guide is intended for the authorized delegated users who are the primary users of AE Application.

- The Authorized delegated user representing a State.
- The Authorized delegated user representing a Third Party Transmitter.

## 1.4. Interface Description

Beginning in July 2007, the authorized delegated users can use the RUP Portal to access the AE application. It provides the following functionality:

- An authorized delegated user can enroll, un-enroll, activate, inactivate and update ASIDs for their organizations.
- An authorized delegated user can reset the password for a previously enrolled ASID.
- An authorized delegated user can select Password as the credential type for an ASID.
- An authorized delegated user can select Certificate as the Credential Type for an ASID.
- An authorized delegated user can replace the Certificate of a previously enrolled ASID.
- An authorized delegated user can change the credential type of an ASID from password to certificate

- An authorized delegated user can change the credential type of an ASID from certificate to password.

## 1.5. Assumptions

The following have been assumed about the reader of this document.

- You are an authorized delegated user who is already registered to use the RUP Portal and have a valid account and password.
- You are an authorized delegated user accessing the AE application via the RUP Portal.
- You understand how to access and use the RUP Portal.
- You have a business need to use the AE application.
- You are using one of the following–Web browsers
  - Internet Explorer (IE) 6.0 for Windows XP, Windows 2000, and Windows NT
  - Netscape 7.0 for Windows XP, Windows 2000, and Windows NT
  - Mozilla 1.3 for Windows XP, Windows 2000, and Windows NT
  - IE 5.5 for Windows 2000 and Windows NT

## 1.6. Conventions

This guide uses the following conventions:

- **Bold**  
Highlights items and indicates specific items from the UI.  
Example: Click **OK** to confirm the changes.
- **Tip, Note, and Important! Alerts**  
Highlight additional information related to the current task or topic. The alerts in this document represent three levels of severity:
  - o **Tip** – Minor severity. Provides information on alternate methods of performing a task or additional system features that may be helpful in your current task.  
Example: **Tip:** You can filter the list of ASIDs by Electronic Filer's Identification Number (EFIN).
  - o **Note** – Average severity. Presents additional information to either explain how the system works or provide directives that may alter the way you perform a non-critical task (that is, the consequences are not as serious as those pointed out in an Important! alert).  
Example: **Note:** The list of Services you see may vary depending on your user type.
  - o **Important!** – Major severity. Warns you when an action (or improper use of a feature) could cause data corruption or other critical system errors.

Example: **Important!** Use extreme care to maintain the integrity of this data. For example, The ASID Sequence number must be unique to the EFIN selected, otherwise the function to create new an ASID will fail with a duplicate ASID error.

## 2. Automated Enrollment Overview

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The AE application was developed to replace the manual enrollment of application systems for Application to Application (A2A) Web Services. The AE application will automate the manual enrollment process and provide a user interface for enrolling and maintaining application systems. An authorized delegated user can use the existing RUP Portal and access the AE application.

To access the AE application and enroll application systems for their organization, the authorized delegated user must have the proper authority. The authorized delegated user for an organization must request for the MeF System Enroller authority to be added to their profile. This is done by accessing the eServices efile application and updating the delegated user section with the authority for MeF System Enroller option checked. Once this role is added to their profile, the authorized delegated user can log into the existing RUP Portal and use the AE application to enroll and maintain application systems for their organization.

The section below describes the overview and the functionality of the AE application in detail.

### 2.1. Functionality of AE

The authorized delegated user can enroll a new ASID, edit an existing ASID, reset the password, replace the certificate, change the credential type, Un-enroll an existing ASID, inactivate an existing ASID and activate an existing ASID.

- **Enroll a new A2A Client System ID**
  - The AE application will allow the authorized delegated user to create a new ASID. This is done by accessing the AE application and entering the data related to creating a new ASID. The data attributes required to create a new ASID is described in section 2.2 below. Enroll is a real time function; once an ASID is created, it is available to use the selected A2A Web Services.

**Important:** The authorized delegated user must invoke the InitialLogin Web Service request upon successful enrollment of an ASID with the credential type of password.

- **Update an existing A2A Client System ID Information**
  - The AE application will allow the authorized delegated user to update the ASID information. The application system ID name, description, location, A2A Client System ID Status, Credential Type, Electronic Transmitter Identification Number (ETINs), and Services can be updated as needed. The data attributes are described in section 2.2 below. Update is a real time function and the changes requested are effective immediately.
- **Un-enroll an existing A2A Client System ID**
  - The AE application allows the authorized delegated user to un-enroll a previously enrolled ASID. To un-enroll an ASID the current status must be one of the

following: new, active or inactive. This is done by editing the ASID and changing the A2A Client System ID status to 'un-enroll'. Un-enroll is a real time function, once an ASID is successfully un-enrolled, it will not be able to use any of the selected A2A Web Services.

**Important:** Once an ASID is successfully un-enrolled, it will be deleted from the system and no further update can be made to this ASID.

- **Inactivate an existing A2A Client System ID**
  - The AE application allows the authorized delegated user to inactivate a previously enrolled ASID. To inactivate an ASID the current status must be active. This is done by editing the ASID and changing the A2A Client System ID status to 'Inactive'. This is a real time function, once an ASID is inactivated successfully, it will not be able to use any of the selected A2A Web Services.
- **Activate an existing A2A Client System ID**
  - The AE application allows the authorized delegated user to activate a previously 'inactivated' ASID. This is done by editing the ASID and changing the A2A Client System ID Status to 'Activate'. This is a real time function, once an ASID is activated successfully, it will be available to use the selected Web Services.
- **Reset the password for an existing A2A Client System ID**
  - The reset password function allows the authorized delegated user to reset the password for an existing ASID. A new password will be auto generated and provided to the user. Reset password is a real time function; this process replaces the old password of an ASID with the new auto generated password.

**Important:** Once the reset password is successfully processed, the authorized delegated user must invoke the ChangePassword A2A web service using the new password provided in the reset password confirmation screen.

- **Replace the Certificate for an existing A2A Client System ID**
  - This is a new function for AE Release 1.1. The replace certificate function allows the authorized delegated user to replace the certificate for an existing ASID. This is a real time function. The old certificate will be replaced with the new certificate.

**Note:** This is a new function of AE Release 1.1.

- **Change the Credential type for an existing A2A Client System ID**
  - The AE application allows the authorized delegated user to change the credential type for an existing ASID. The credential type can be changed from password to certificate or from certificate to password. Change credential type is a real time function and the changes requested are effective immediately.

**Note:** This is a new function for AE Release 1.1.

- **View a previously deleted A2A Client System ID information**
  - The AE application allows the authorized delegated user view the information of a previously deleted ASID. This information is read only and the deleted ASID is not available for any edits.

**Note:** This is a new function for AE Release 1.1.

## 2.2. Data attributes used in AE application

The section below describes the data elements used in the AE application. The table 2-1 below describes the data elements.

**Table 2-1 Data Elements for AE**

<b>Data Elements</b>	<b>Description</b>
A2A Client System ID (ASID)	A2A Client System ID (8 characters): This is made up of the EFIN + Application System ID (ASID) Sequence Number (any 2 numeric).
Application System Name	The name that the delegated user wants to assign to this system. It is limited to 30 alphanumeric characters.
Description	The description that the delegated user wants to use to identify this system. It is limited to 50 alphanumeric characters.
Location	The City and State where this system resides. It is limited to 30 alphanumeric characters.
A2A System ID Status	Status associated with an ASID. The available status for an ASID is described in <a href="#">Section 2-4</a> below.
Available Services	The Web Services that the delegated user wants to assign to this System ID. <b>Note:</b> This is limited to the Web Services available to the user (e.g., only states may assign GetSubmissions, only transmitters may assign GetNewAcks, etc.).
ETINs	The ETINs that the delegated user wants to assign to this System ID.
Credential Type	The credential type is either password or certificate. This is a new option for AE Release 1.1.
Certificate File Name	The file name and location of the certificate. This is a new option for AE Release 1.1.

**Note:** The authorized delegated user has the option to update the information once the ASID is enrolled. The ASID is read only and can not be modified. Other system ID information (name, description, status, credential type, services and ETIN) associated with the ASID is available for any updates.

### 2.3. Available Services for an ASID

The AE application will provide the authorized delegated users with a list of services based on the delegated user’s business type. The available A2A Web Services are different for States and Third Party Transmitters.

The table 2-2 below shows the list of available services for a State user.

**Table 2-2 Available Services for a State User**

User Type	Available Services
State user	
	Get Submission
	Send Submission Receipts
	Send Acknowledgements
	Get Acknowledgement Notifications
	Request ETIN Status
	Request List of ETINS
	Request List of State Participants

The table 2-3 below describes the available services for a Third Party Transmitter user.

**Table 2-3 Available Services for Third Party Transmitter**

User Type	Available Services
Third Party Transmitter user	
	Get Acknowledgements
	Get Submissions Status
	Send Submissions
	Request ETIN Status

	Request List of ETINS
	Request List of State Participants

## 2.4. Allowed Status changes

The authorized delegated user has the option to change the status of an ASID. This is done by editing the ASID and by selecting the applicable value for the A2A Client System ID Status from the drop down list box.

The Table 2-4 Status Matrix describes the list of allowed status values for an ASID.

**Table 2-4 Status Matrix**

Current Status of ASID	New Status	Action
New	Un-enrolled	Allowed
Active	Inactivate	Allowed
Active	Un-enrolled	Allowed
Inactive	Activate	Allowed
Inactive	Un-enrolled	Allowed

**Important:** Once an ASID is un-enrolled, it will not be available for any further updates. The authorized delegated user can view the information of the un-enrolled ASID as read only.

## 3. Getting Started

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The AE application can be accessed by logging into the existing RUP Portal. This section explains how to launch the AE application and introduces the user to the AE user interface.

### 3.1. Prerequisites

To access the AE application, the authorized delegated must have a valid user ID and password for the RUP Portal. To access the AE application and enroll application systems for their organization, the authorized delegated user must have the proper authority. The authorized delegated user for an organization must request for the 'MeF System Enroller' authority to be added to their profile. This is done by updating the eServices e-File application with the MeF System Enroller authority. Once this role is added to their profile, the authorized delegated user can log into the existing RUP Portal and use the AE application to enroll and maintain application systems for their organization.

### 3.2. IRS Home

As a registered user, the authorized delegated user will access the Modernized e-File application(s) from the IRS Web page. The URL for the main page is <http://www.irs.gov> as is shown in Figure 3-1, IRS Home Page.



**Figure 3-1 IRS Home Page**

From the IRS home page, the delegated user can access the Modernized e-File system by clicking on the e-File icon, as shown above. After the delegated user clicks on the e-File icon, the e-File page opens. The Figure 3-2 below shows the e-File Page.

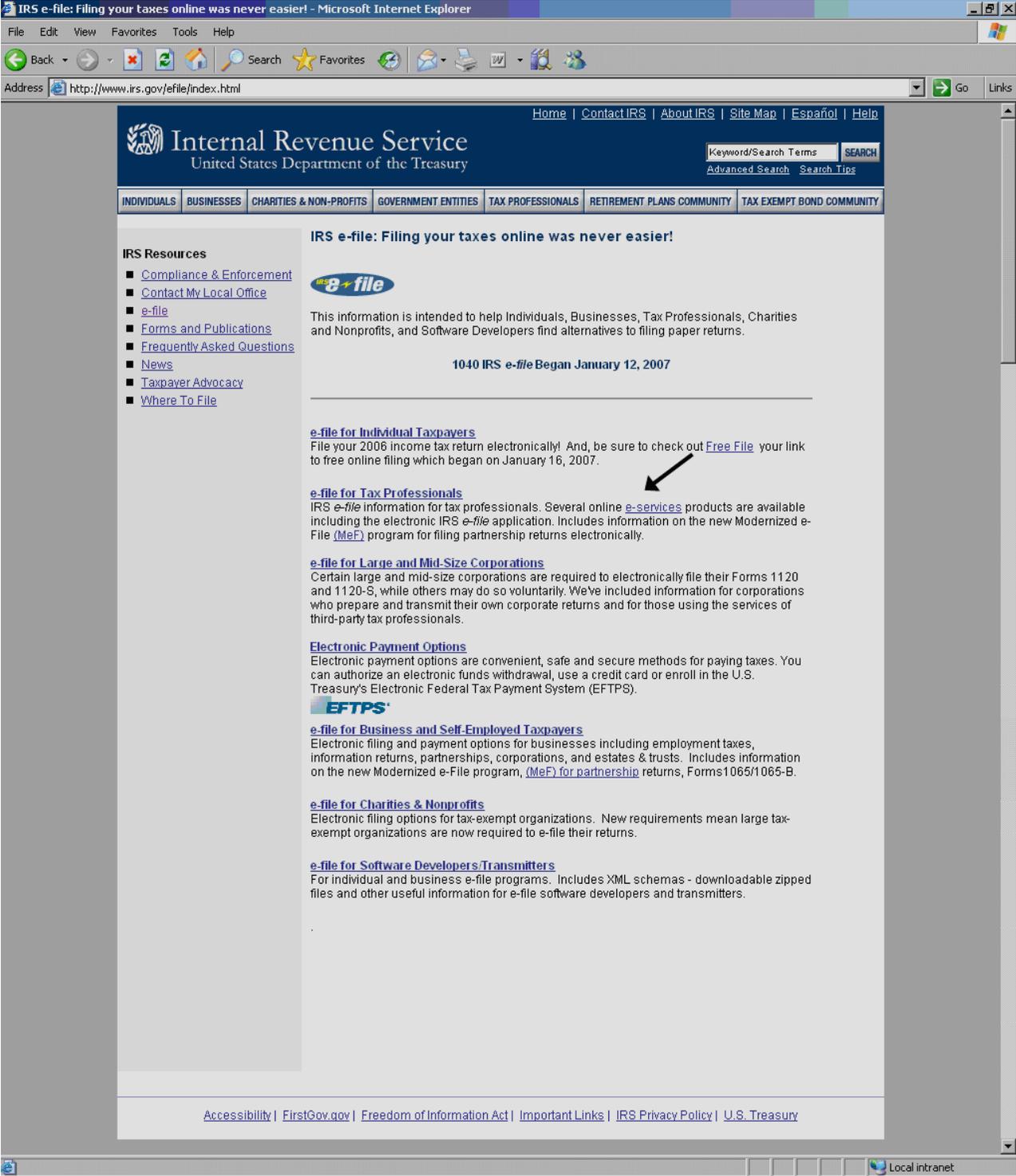
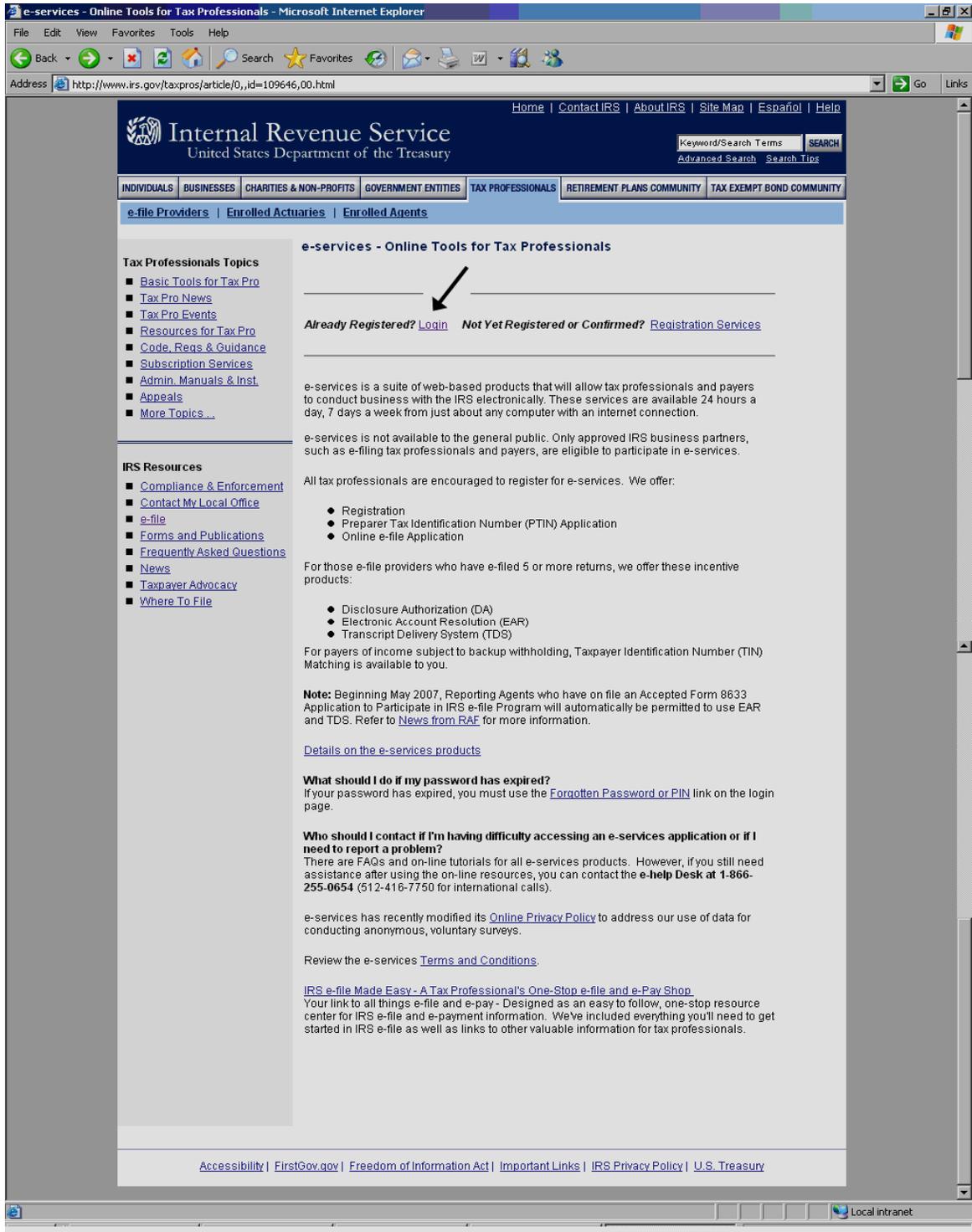


Figure 3-2 e-File Page

From the e-File page, the user clicks on the link for **e-services** under the section e-File for Tax professionals. This takes the user to the e-File for Tax Professionals page. The Figure 3-3 e-File for Tax Professionals Page is shown below.



**Figure 3-3 e-File Tax Professionals Page**

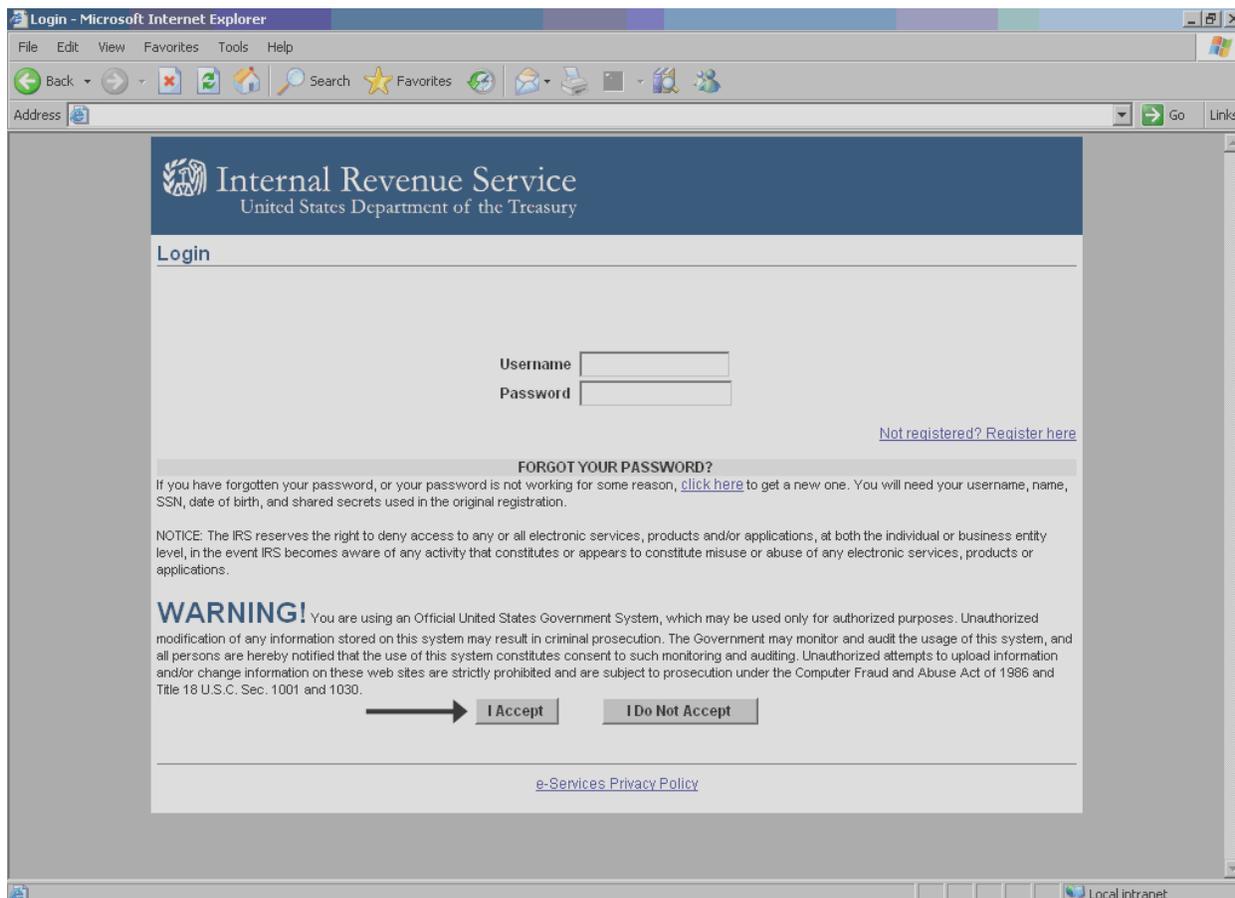
From the e-File tax professionals page the user clicks on the link for **Login**. This takes the user to the login page for the RUP Portal. The Figure 3-4 RUP Login Page shows the login page for the RUP Portal.

### 3.3. Registered User Portal Login

Alternately the user can access the RUP Login Page by directly typing the URL <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.

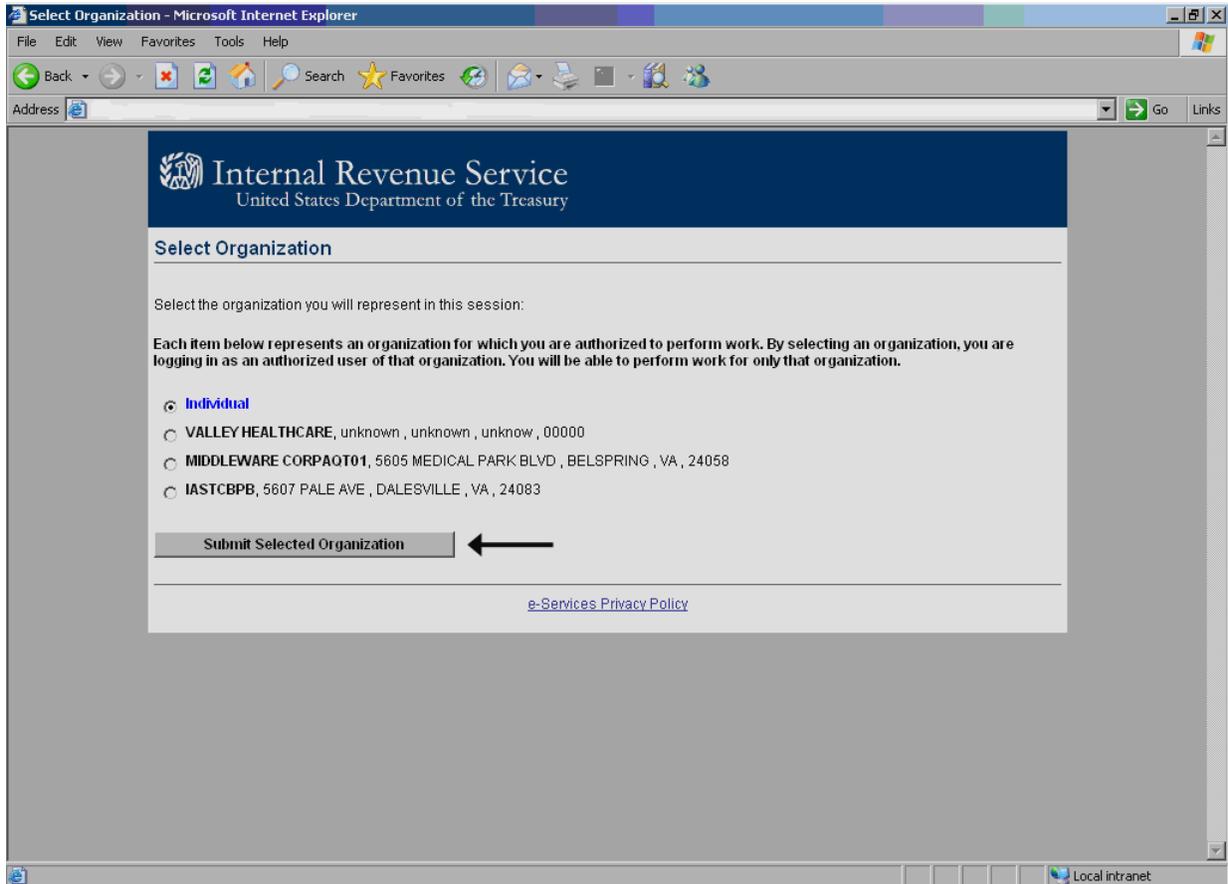
From the RUP login page, the user enters a valid user ID and password into the appropriate text boxes and reads through the Terms of Use for the Portal. The user then clicks on the **I Accept** button.

**Note:** The user will not be allowed into the RUP Portal, if the user disagrees on the Terms of Use and clicks on the **I Do Not Accept** button.



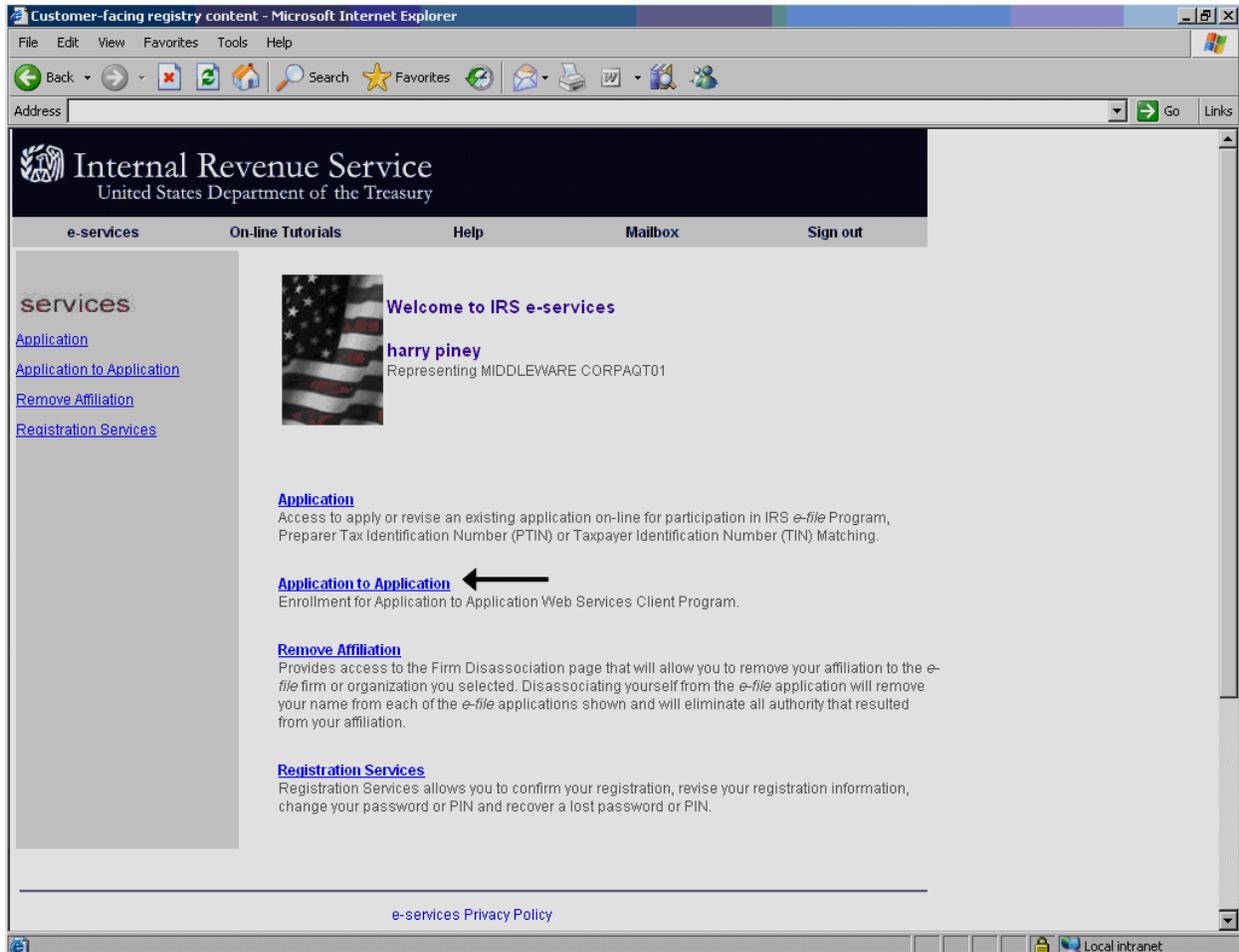
**Figure 3-4 RUP Login Page**

Clicking on the **I Accept** button takes the user to the personality selection page. The Figure 3-5 RUP Personality Selection Page shows the personality selection page for the RUP Portal.



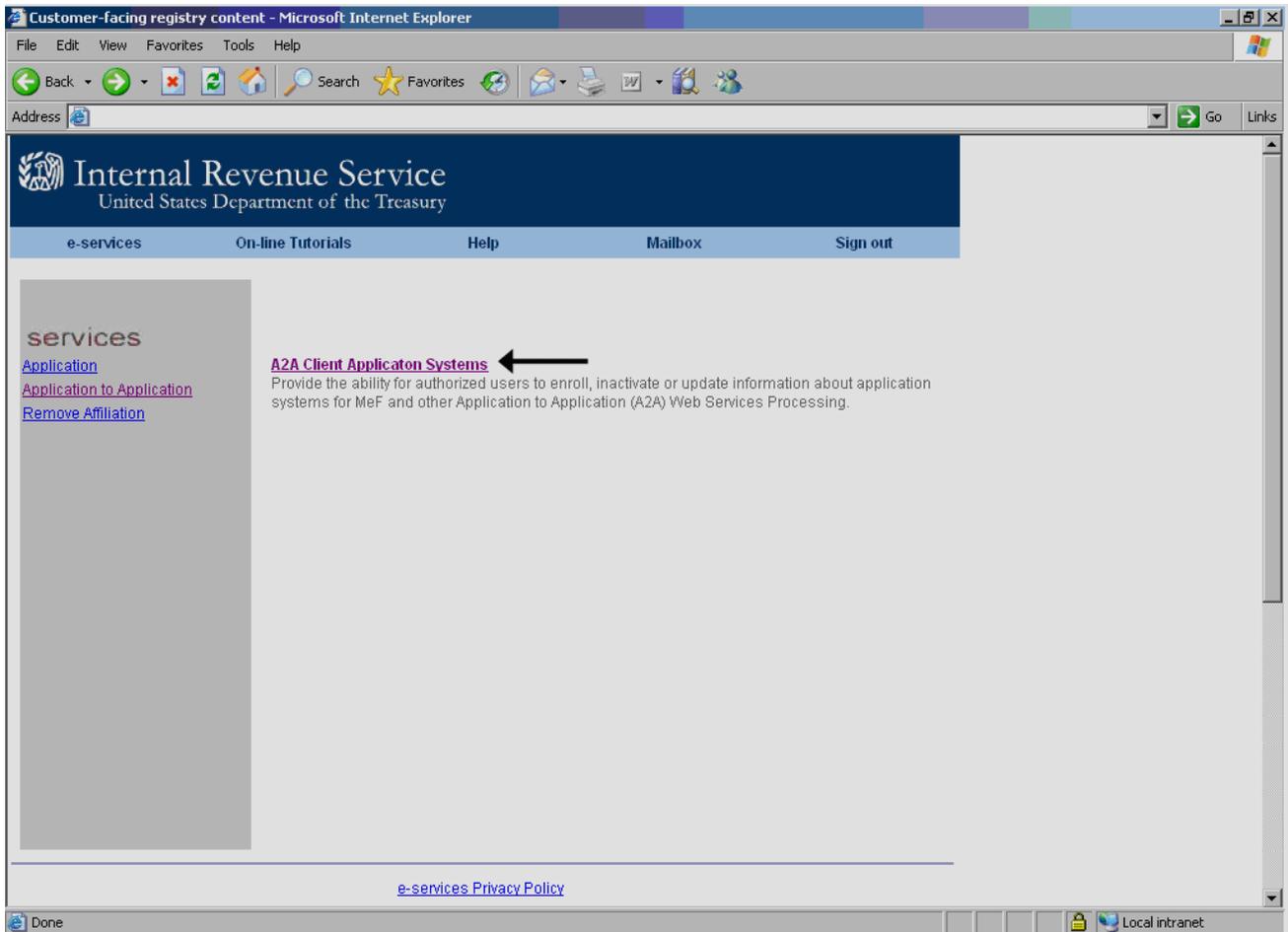
**Figure 3-5 RUP Personality Selection Page**

From the RUP personality selection page, the user selects a personality and clicks on the **Submit Selected Organization** button. This takes the user to the welcome page for the RUP Portal. The Figure 3-6 RUP Welcome Page shows the welcome page for RUP Portal.



**Figure 3-6 RUP Welcome Page**

From the RUP welcome page, the user clicks on the **Application to Application** link to access the AE application. This takes the user to the A2A Menu Selection Page. The Figure 3-7 A2A Menu Selection Page shows the menu selection page for the AE application.



**Figure 3-7 A2A Menu Selection Page**

From the A2A menu selection page the user clicks on the **A2A Client Application Systems** link. This takes the user to the AE Welcome Page. The Figure 3-8 AE Landing Page shows the welcome page for AE.

### 3.4. Automated Enrollment Landing Page

The AE landing page displays a list of existing ASIDs for the selected personality of the authorized delegated user. From here the authorized delegated user can edit existing ASIDs or enroll new ASIDs for their organization.

The navigation of the AE application is described in Section 4 below.

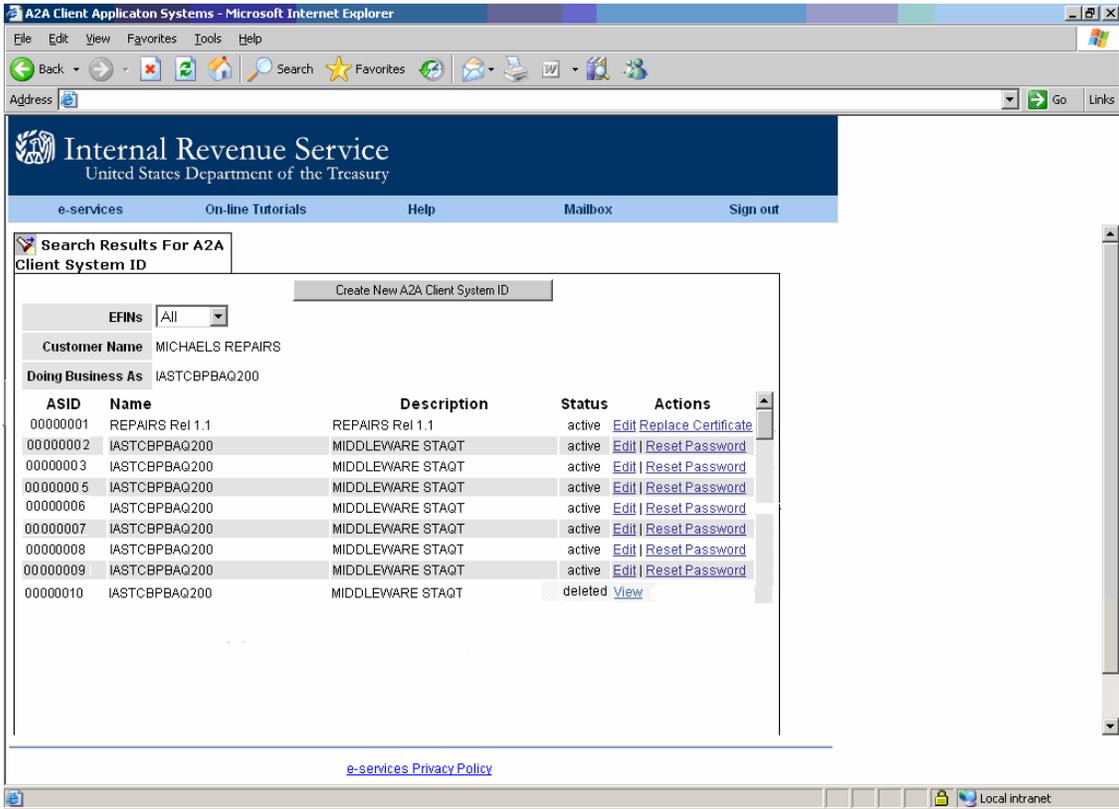
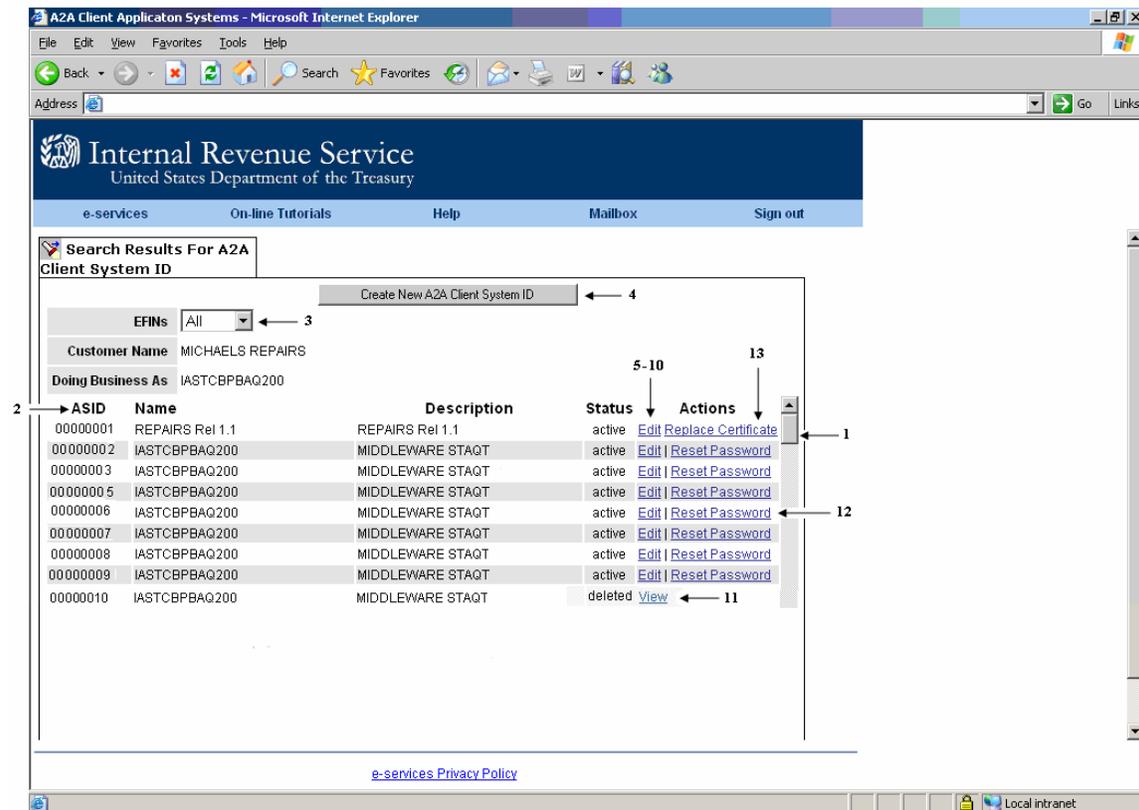


Figure 3-8 AE Landing Page

## 4. Automated Enrollment Navigation

The landing page for the enrollment application is the search results page as described below. Based on personality selected by the authorized delegated user, the AE application will retrieve a list of existing ASIDs, if any for the user. The section below describes the data displayed on the AE landing page.

The Figure 4-1 Navigation for AE shows the navigation for accessing the AE application.



**Figure 4-1 Navigation for AE**

1. The user can scroll through the list of existing ASIDs. The maximum number of records is set to 200.
2. By default the search results are sorted by the ASID column.
3. If more than one EFIN is found, the user has the option to filter based on the EFIN from the drop down list box.
4. The user can click on the **Create New A2A Client System ID** button to enroll a new A2A Client Application System.
5. The user can click on the **Edit** link to update the information for an existing A2A Client Application System. The user can update the following information:

- a. Application System name
  - b. Description
  - c. Location
  - d. Services
  - e. ETINs
6. The user can click on the **Edit** link to un-enroll a previously enrolled ASID.
  7. The user can click on the **Edit** link to inactivate a previously enrolled ASID.
  8. The user can click on the **Edit** link to activate a previously inactivated ASID.
  9. The user can click on the **Edit** link to change the credential type.  
**Note:** This option is not available in AE Release 1.0.
  10. The user can click on the **Edit** link to change the credential type of an ASID from password to certificate or from certificate to password.
  11. The user can click on the **View** link to view the read only information for an ASID that is un-enrolled.
  12. The user can click on the **Reset Password** link to reset the password of an ASID.
  13. The user can click on the **Replace certificate** link to replace the certificate for an ASID.

In addition the AE application displays the customer name and the doing business as name for the authorized delegated user.

## 5. Enroll a New A2A Client Application System

---

This section describes the user actions for enrolling a new ASID. The authorized delegate user can perform this function by accessing the enrollment application and entering in the required information for enrolling a new ASID. The following information is required to enroll a new ASID; EFIN, ASID sequence number, Application System Name, Description, Location, Credential Type, Services and ETINs.

The section below describes the navigation and the user actions to enroll a new ASID.

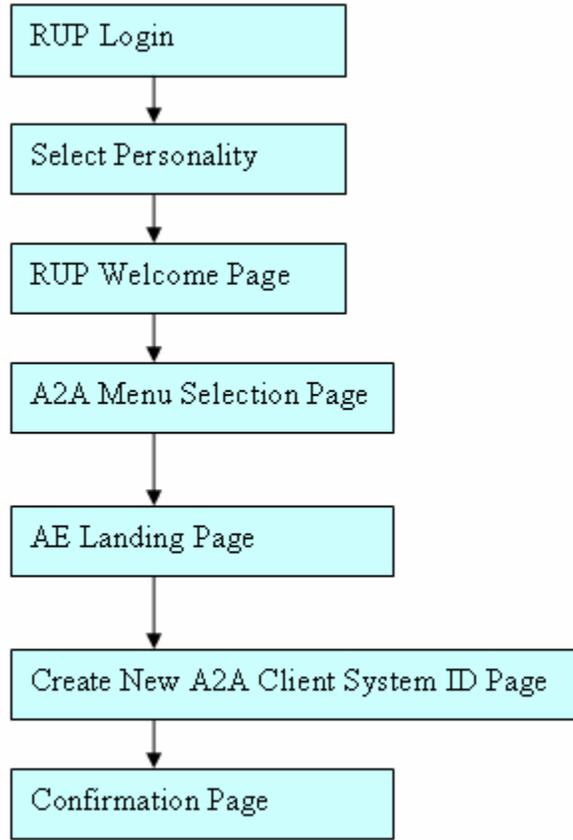
### 5.1. Prerequisites

In order to enroll a new ASID, the authorized delegated user must have valid user credentials to log into the RUP Portal. The user must have the role to access the AE application.

### 5.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the '**Application to Application**' link from the RUP Welcome Page. This takes the user to the A2A Menu selection Page, the user then clicks on the '**A2A Client Application Systems**' link to access the AE Landing Page. From the AE landing page, the user clicks on the '**Create New A2A Client System ID**' button to enroll a new A2A Application System.

The Figure 5-1 Navigation to Enroll depicts the navigation for enrolling a new A2A Client System ID.



**Figure 5-1 Navigation to Enroll**

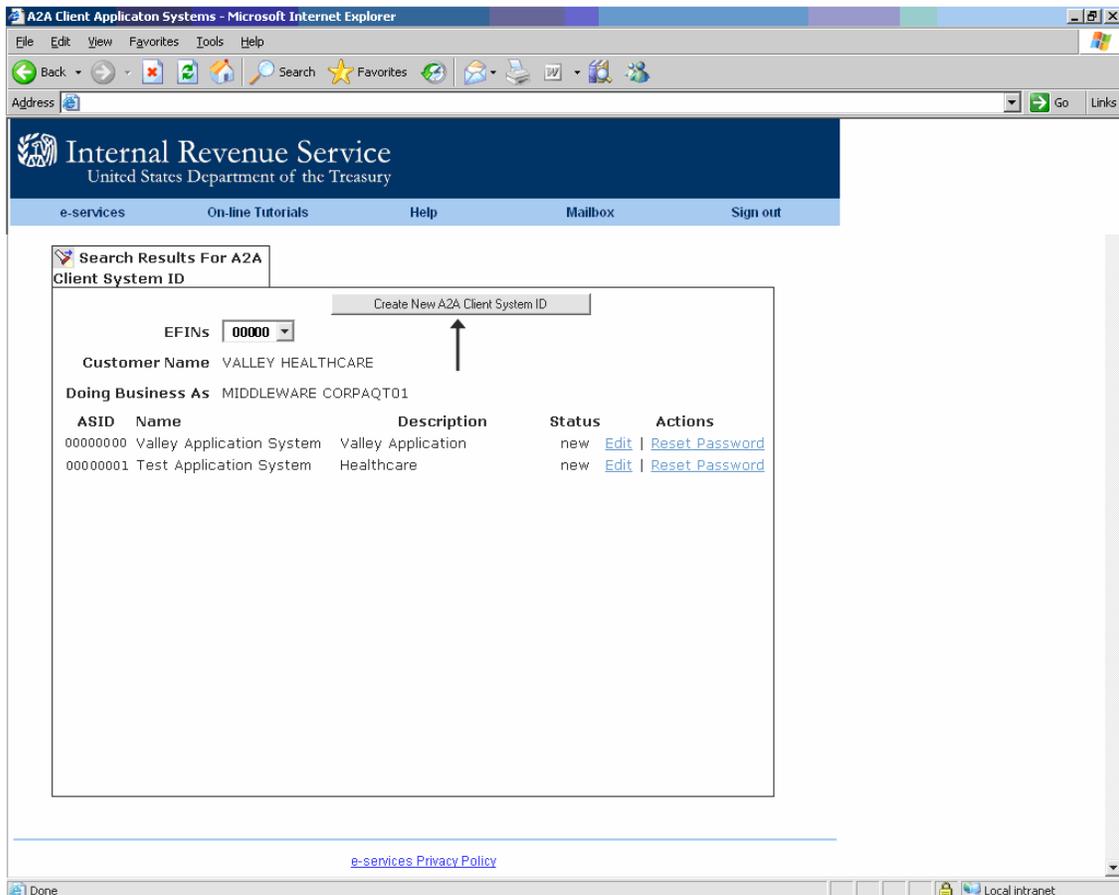
### 5.3. Required User Input

- **A2A Client System ID:** The A2A Client System ID is a combination of the EFIN and ASID sequence number. The authorized delegated user must select an EFIN from the drop down list and enter a two character numeric ASID sequence number. The ASID sequence number must be unique for the selected EFIN.
- **Application System Name:** The name the delegated user wants to assign to the ASID. The application system name is limited to 30 alphanumeric characters.
- **Description:** The description the delegated user wants to use to identify the ASID. The description field is limited to 50 alphanumeric characters.
- **Location:** The city and the state where the ASID resides. The location field is limited to 30 alphanumeric characters.
- **Credential Type:** The credential type is either password or certificate.
- **Certificate File Name:** The certificate file the delegated user wants to use. This feature is a new feature of AE Release 1.1.
- **Web Services:** The authorized delegated user must select at least one Service from the available service list. The available services list is based on the delegated user's business type. Refer to the Table 2-2 Available Services for a State Entity and Table 2-3 Available Services for Third Party Transmitter as described in [Section 2.3](#) Available Services for an ASID.

- **ETIN:** The ETINs that the delegated user wants to assign to this System ID. The delegated user must select at least one ETIN from the available ETINs list.

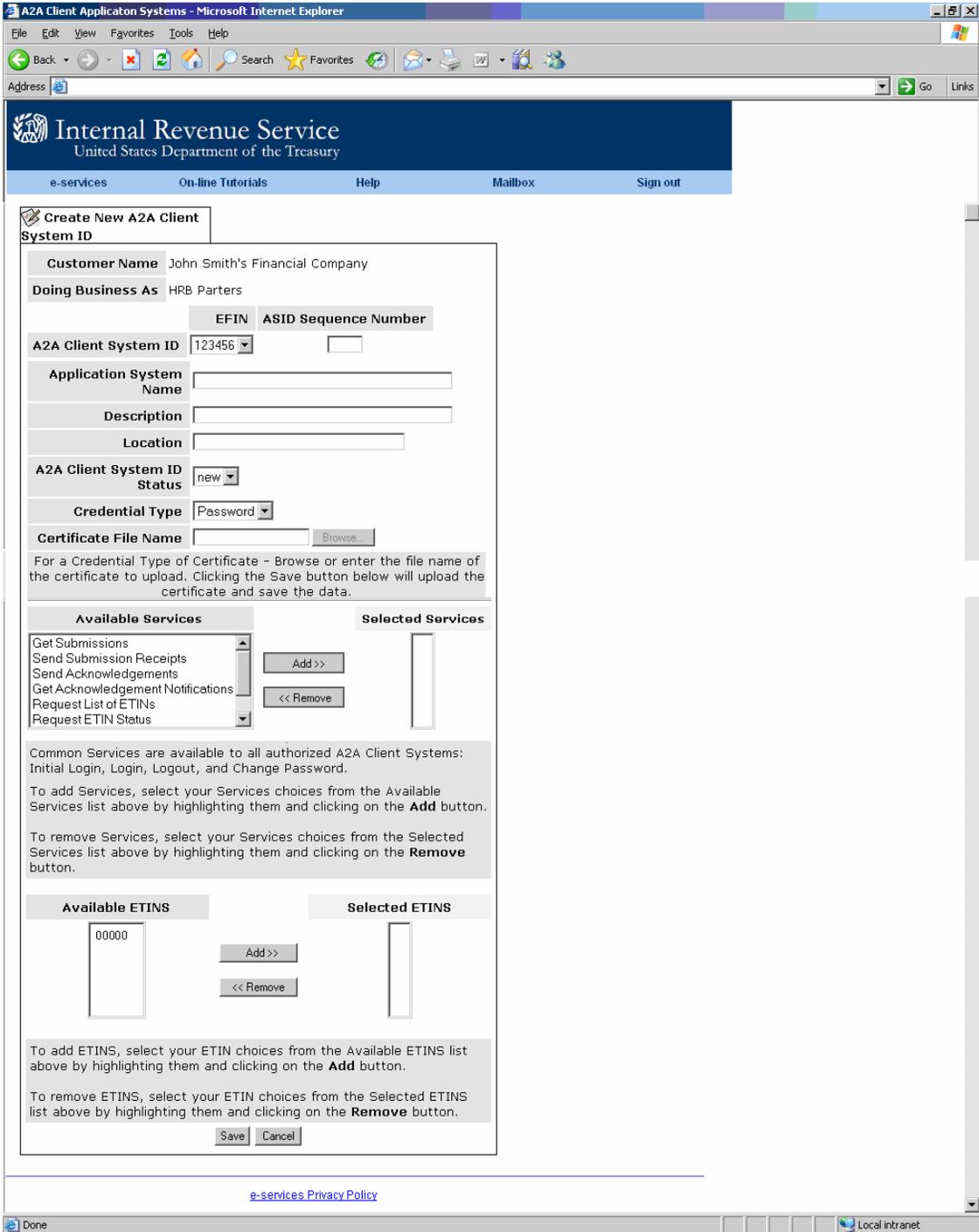
## 5.4. User Actions

- Type the URL for the RUP Portal Login Page <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid user ID and password to log in. Refer to [Section 3.3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer to [Section 3.3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on the **Application to Application** link from the RUP welcome page. Refer to [Section 3.3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.
- Click on the **A2A Client Application Systems** link from the A2A Menu Selection Page. Refer to [Section 3.3](#) Registered User Portal Login, Figure 3-7 A2A Menu Selection Page.
- Click on the **Create New A2A Client System ID** button from the AE Landing Page. The Figure 5-2 Create New A2A Client System ID shows the link to create a new A2A client system ID.



**Figure 5-2 Create New A2A Client System ID Link**

- Click on the **Create New A2A Client System ID** button. The user is taken to the Create New Client System ID screen. The Figure 5-3 Create New A2A Client System ID Page shows the screen to create a new system ID.



**Figure 5-3 Create New A2A Client System ID**

- Select an EFIN from the EFIN drop down list box.
- Enter the 2 digit number into the text box labeled ASID Sequence number. The 2 digit number must be unique for the selected EFIN.  
**Note:** A2A Client System ID (ASID) is a combination of EFIN and the ASID sequence number.
- Enter a name for the ASID into the text box labeled Application System Name. The application system name is limited to 30 alphanumeric characters.
- Enter a description for the ASID into the text box labeled Description. The description field is limited to 50 alphanumeric characters.
- Enter a value that the user wants to use for the location of the ASID into the text box labeled Location. For example the location can be city and state where this ASID will be located. The location field is limited to 30 alphanumeric characters.
- A2A Client System ID Status is not selectable for a creating a new ASID. The only value available in the drop down list is new.
- Select the credential type. The credential type is a drop down list box and can be password or certificate.
- Enter the certificate file name and location into the text box labeled Certificate File Name or click on the **Browse** button to upload the certificate file.  
**Note:** The certificate file name is a required if the credential type selected is certificate.
- Select the Services from the available web services column and click on the **Add** button. Refer to Table 2-2 Available Services for a State User and Table 2-3 Available Services for a Third Party Transmitter from Section 2-3 Available Services for an ASID. The authorized delegated user must select at least one service from the available service list.  
**Tip:** To remove a service, select the service from the selected service list and click on the **Remove** button.
- Select the ETINs from the available ETINs list and click on the **Add** button. The authorized delegated user must select at least one ETIN from the available ETIN list.  
**Tip:** To remove an ETIN from the selected ETINs list, select the ETIN from the selected ETIN list and click on the **Remove** button.
- Click the **Save** button to submit the request to create an ASID. If the request to create a new ASID is successful, the authorized delegated user will be taken to a confirmation page. Refer to [Section 5.6](#) Confirmation Page for details.
- The user has the option to cancel the request to create an ASID. Clicking on the **Cancel** button will return the user back to the AE Landing Page.

**Important:** If the event of a validation error, the user is presented with a pop up error message with the details of the validation error.

The Figure 5-4 Pop Up Validation Error shows the validation errors for creating a new ASID.



**Figure 5-4 Pop Up Validation Error**

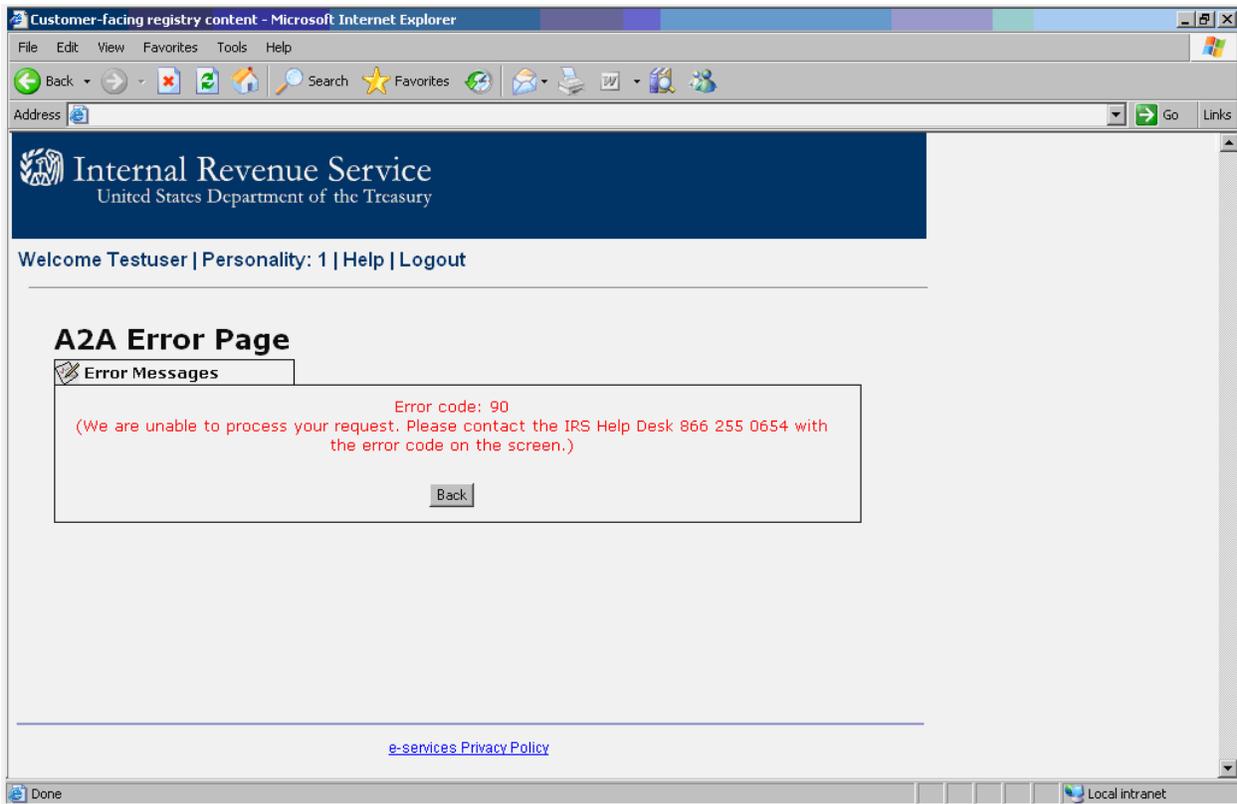
**Note:** Click to the **OK** button to return to the Create New A2A Client System ID screen to fix the error and try again.

## 5.5. Error Page

In the event of a system error, the user will be taken to an error page with the details of the error in red text. Follow the instructions on the screen and call the IRS Help Desk if needed with the details of the error message and the action that triggered this error.

**Note:** In case of a certificate validation failure error, click on the **OK** button from the error page to return to the previous screen to try again or cancel the request to enroll.

The Figure 5-5 AE System Error Message for Creating a New ASID shows the error message.



**Figure 5-5 AE System Error Message for creating a New ASID**

**Note:** Clicking on the **Back** button will return the user back to the AE landing page.

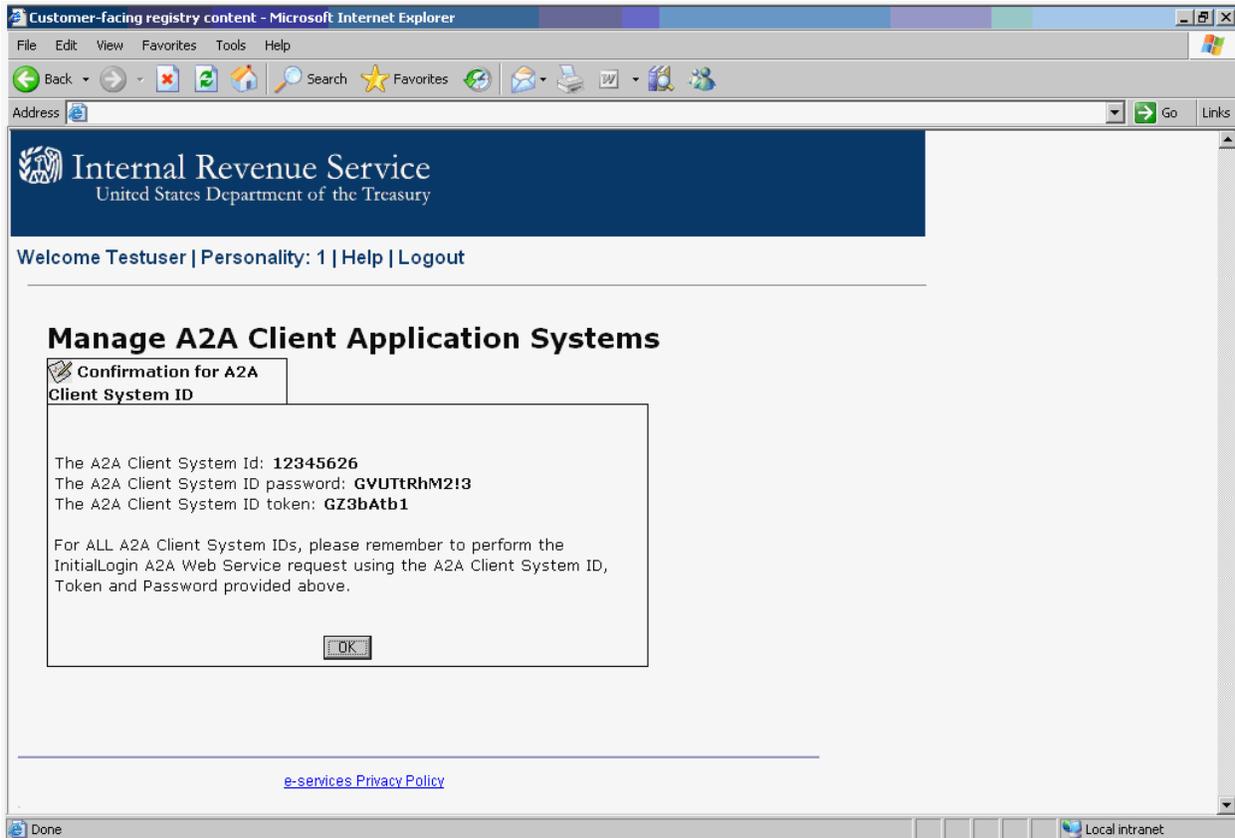
## 5.6. Confirmation Page

The confirmation page below is displayed if the create application system ID is successful. For the credential type of password the following information is displayed on the confirmation page:

- A2A Client System ID
- Password. This is displayed for the credential type of password only.
- Token. This is displayed for the credential type of password only.
- **OK** button, clicking on the **OK** button returns the user back to the [Search Results](#) screen.
- Information text.

**Note:** The request to enroll is a real time function. The authorized delegated user must remember to perform the InitialLogin A2A Web Service request using the A2A Client System ID, password and token displayed on the confirmation screen.

The Figure 5-6 Confirmation Page for Creating a New ASID depicts the confirmation screen.



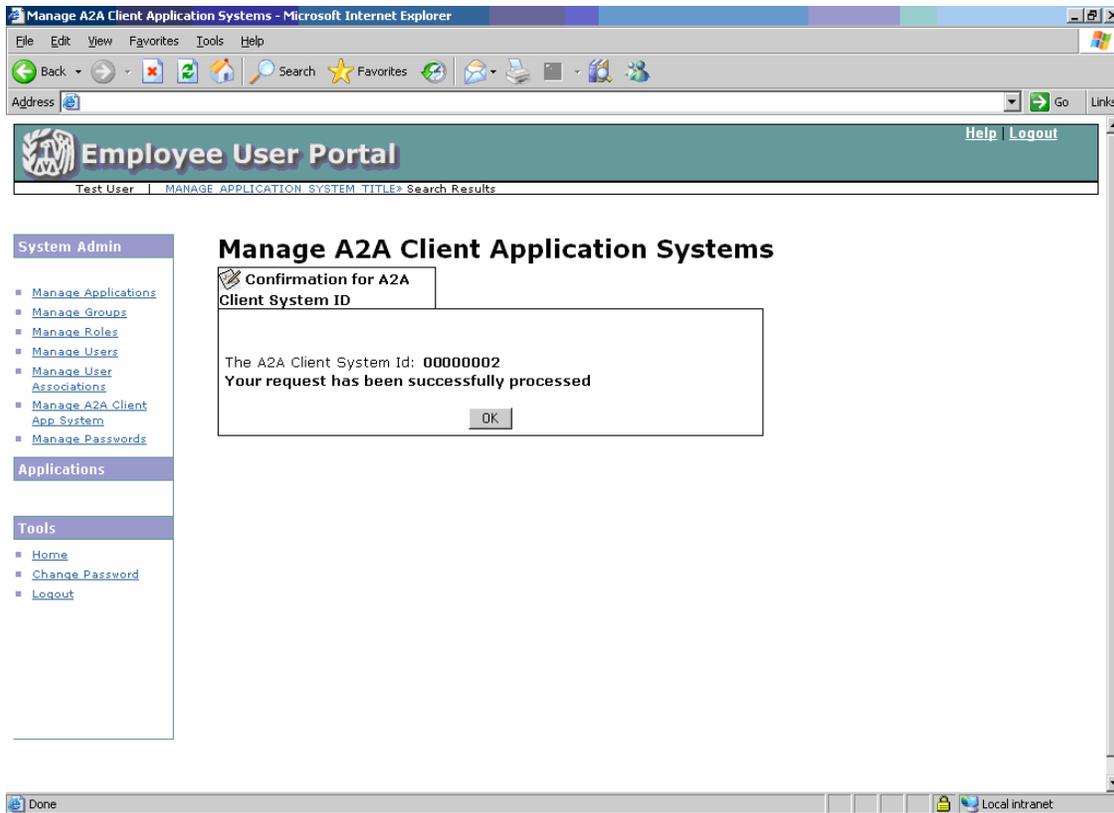
**Figure 5-6 Confirmation Page for Creating a New ASID with Password as the Credential Type**

For the credential type of certificate, the following information is displayed on the confirmation screen:

- A2A Client System ID
- **OK** button, clicking on the **OK** button returns the user back to the [Search Results](#) screen.
- Information text.

**Note:** The request to enroll is a real time function. The e-Help Desk user must remind the delegated user to invoke the Web Services request using the A2A Client System ID displayed on the confirmation screen and the certificate that was uploaded for this ASID.

The Figure 5-7 Confirmation Screen for Create New ASID with Certificate depicts the confirmation screen for creating a new ASID with certificate as the credential type.



**Figure 5-7 Confirmation Screen for Create New ASID with certificate as the credential type**

## 6. Edit an Existing ASID

---

The edit function allows the authorized delegated user to update the information associated with an existing ASID. The delegated user has the option to update any or all of the following data attributes; application system name, description, location, Status, Services and ETINs. This section describes the navigation and the process of editing existing ASID information.

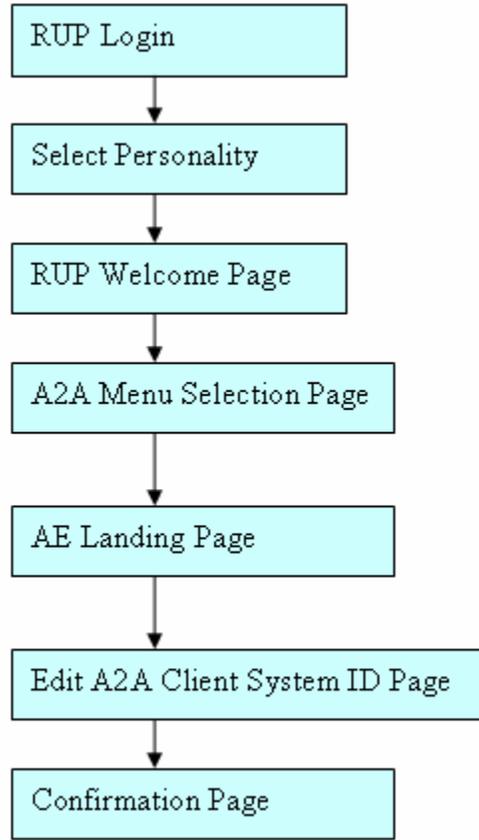
### 6.1. Prerequisites

In order to edit an existing ASID, the authorized delegated user must have a valid user ID and password for the RUP Portal. In addition the user must have the authority to access the AE application.

### 6.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the **Application to Application** link from the RUP Welcome Page. This takes the user to the A2A Menu selection Page, the user then clicks on the **A2A Client Application Systems** link to access the AE Landing Page. From the AE landing page, the user locates the ASID to edit and clicks on the **Edit** link to under the Action column.

The Figure 6-1 Navigation to Edit an Existing ASID depicts the navigation for editing an existing ASID.



**Figure 6-1 Navigation to Edit an Existing ASID**

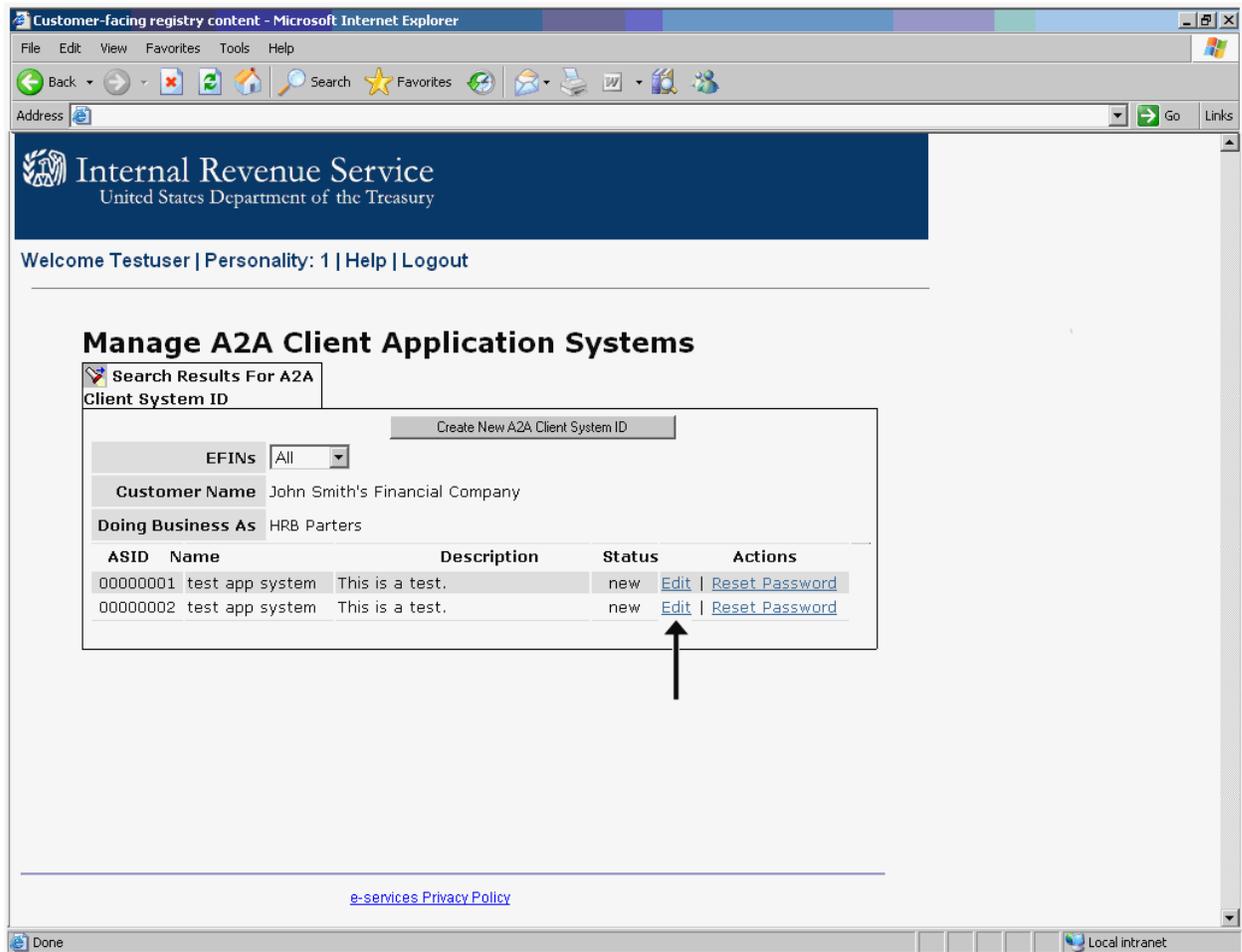
### 6.3. Required User Input

The data attributes described below are available for editing. The authorized delegated user has the option to update any or all of the following data attributes as needed.

- **Application System Name:** The name the delegated user wants to assign to the ASID. The application system name is limited to 30 alphanumeric characters.
- **Description:** The description the delegated user wants to use to identify the ASID. The description field is limited to 50 alphanumeric characters.
- **Location:** The city and the state where the ASID resides. The location field is limited to 30 alphanumeric characters.
- **A2A Client System ID Status:** Status associated with the ASID, the AE application provides a drop down list box with the list of available statuses for an ASID. Refer Table 2-4 Status Matrix from [Section 2-4](#) for a list of allowed status changes for an ASID.
- **Available Services:** The authorized delegated user must select at least one service from the available services list box. The available services list is based on the delegated user type. Refer Table 2-2 Available Services for a State User and Table 2-3 Available Services for Third Party Transmitter as described in [Section 2.3](#) Available Services for an ASID.
- **ETIN:** The ETINs that the delegated user wants to assign to this ASID. The authorized delegated user must select at least one ETIN from the available ETINs list.

## 6.4. User Actions

- Type the URL for the RUP Portal Login Page <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid **user id** and **password** to log in. Refer the [Section 3.3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer the [Section 3.3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on **the Enrollment for A2A** link from the RUP welcome page. Refer to [Section 3.3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.
- Click on **the A2A Client Application Systems** link from the A2A Menu Selection Page. Refer the [Section 3.3](#) Registered User Portal Login, Figure 3-7 A2A Menu Selection Page.
- Locate the **ASID** and click on the edit link under the Action column. The Figure 6-2 Edit Link shows the **Edit** link for an existing ASID.



**Figure 6-2 Edit Link**

- The delegated user is taken to the edit ASID page. The Figure 6-3 Edit A2A Client System ID. The Figure 6-3 Edit ASID Page depicts the page for editing existing ASID information.

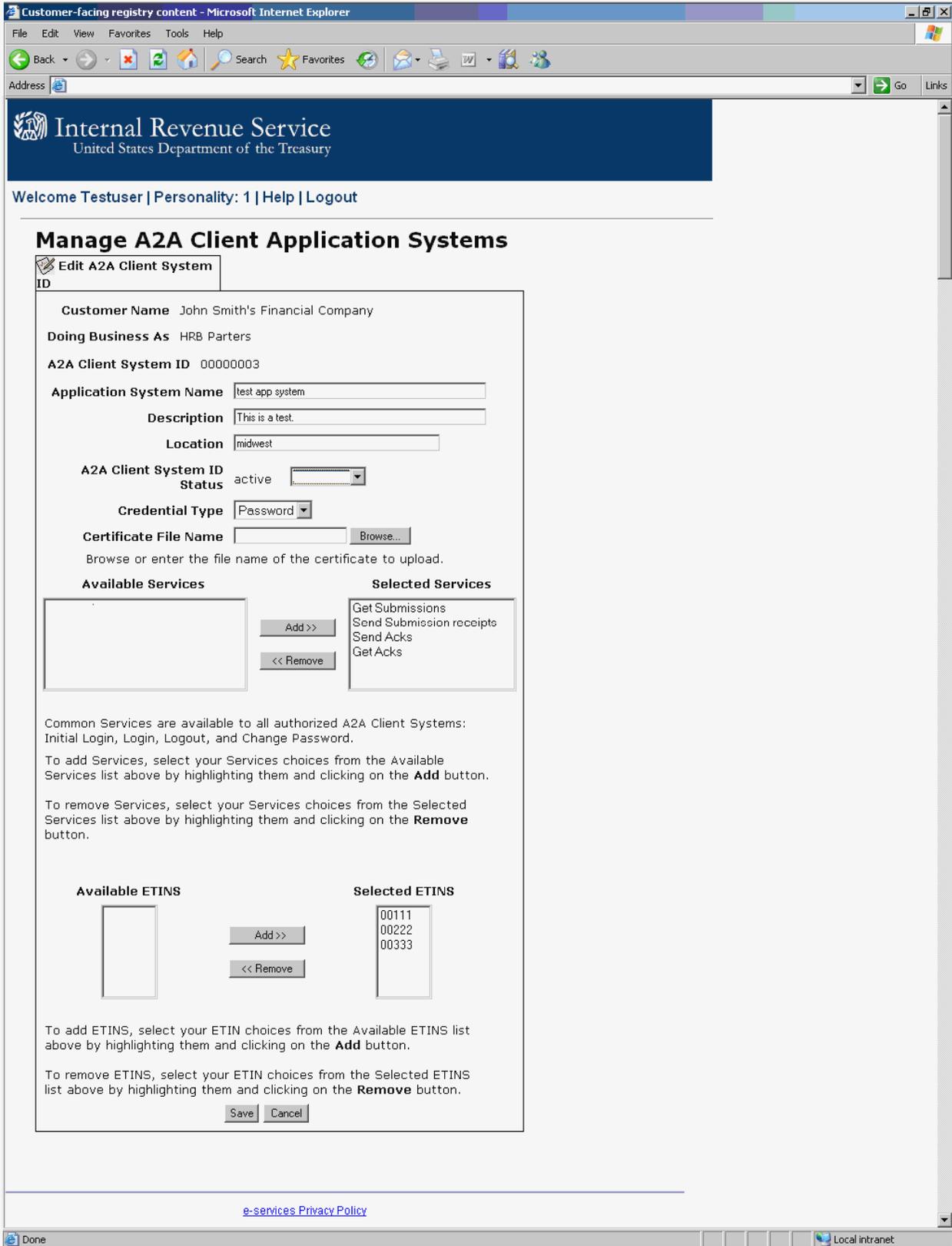


Figure 6-3 Edit ASID Page

- Enter a new name if applicable into the text box labeled Application System Name.  
**Note:** The application system name field has a limit of 30 alphanumeric characters.
- Enter a new description for the ASID if applicable into the text box labeled Description.  
**Note:** The description field has a limit of 50 alphanumeric characters.
- Enter a new location for the ASID if applicable into the text box labeled Location.  
**Note:** The location field has a limit of 30 alphanumeric characters.
- Select a new status if applicable from the drop down list box labeled A2A Client System ID Status. Refer Table 2-4 [Available Status Changes](#) from Section 2-3 for a list of allowed status changes for an ASID.
- Update the Services list if applicable. The delegated user has the option to add or remove services associated with an ASID. To add service(s) highlight the service(s) from the Available Services list box and click on the **Add** button. To remove service(s) highlight the service(s) from the Selected Service list box and click on the **Remove** button.
- Update the ETIN list if applicable. The delegated user has the option to add or remove ETINs associated with an ASID. To add ETIN(s) highlight the ETIN(s) from the Available ETINs list box and click on the **Add** button. To remove ETIN(s) highlight the ETIN(s) from the Selected ETINs list and click on the **Remove** button.
- Click on the **Save** button to submit the request to update the system id information.
- The user has the option to cancel the request by clicking on the **Cancel** button. Clicking on the **Cancel** button will return the user back to the AE Landing Page.

**Important:** If the event of a validation error, the user is presented with a pop up error message with the details of the validation error. Click on the **OK** button to go back to the Edit A2A Client System ID Screen to fix the error and try again.

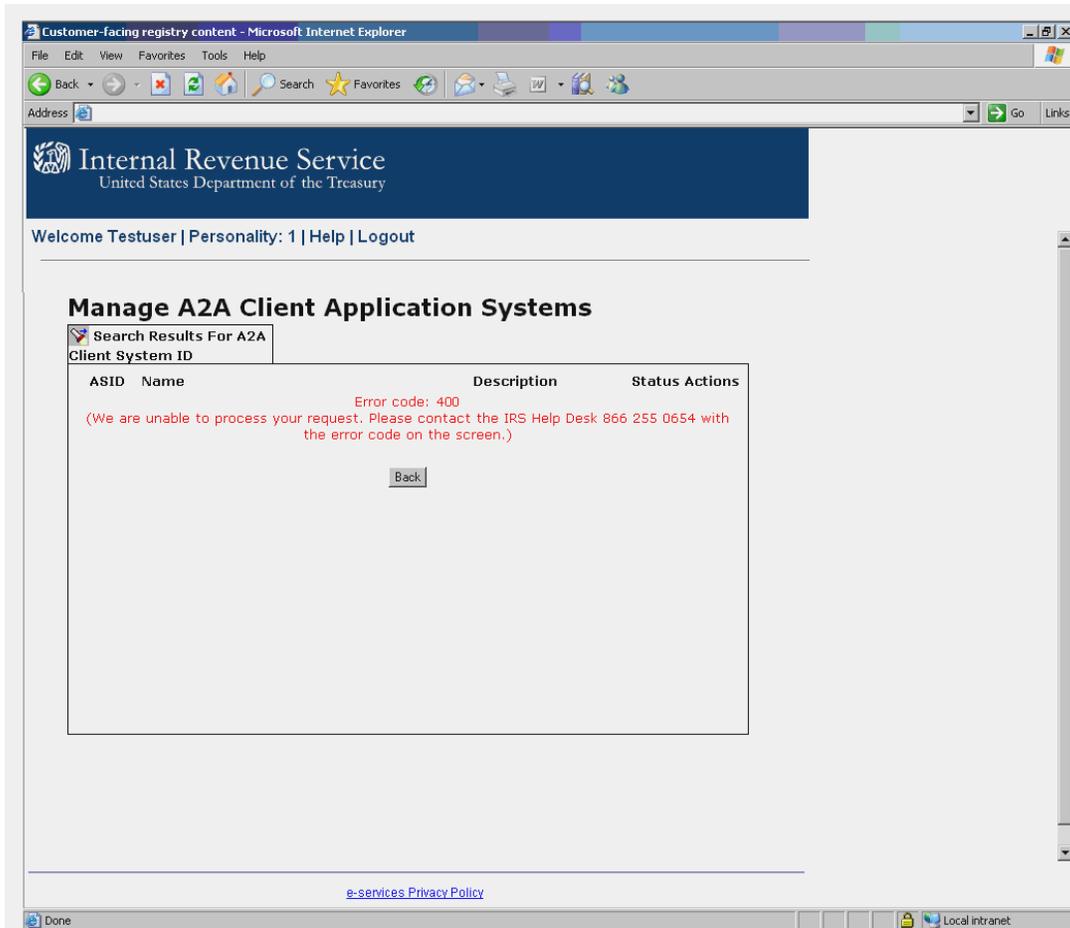
The Figure 6-4 Pop Up Validation Error for Editing an ASID depicts the error message where the user failed to enter a value for a required attribute.



**Figure 6-4 Pop Up Validation Error for Editing an ASID**

## 6.5. Error Page

In the event of a system error, the user will be taken to an error page with the details of the error in red text. Follow the instructions on the screen and call the IRS Help Desk if needed with the details of the error message. The Figure 6.5 AE System Error Message for Editing an ASID depicts an error screen.



**Figure 6-5 AE System Error Message for Editing an ASID**

**Note:** Clicking on the **Back** button will return the user back to the AE Landing Page. In case of a fatal system error, there will be a close button

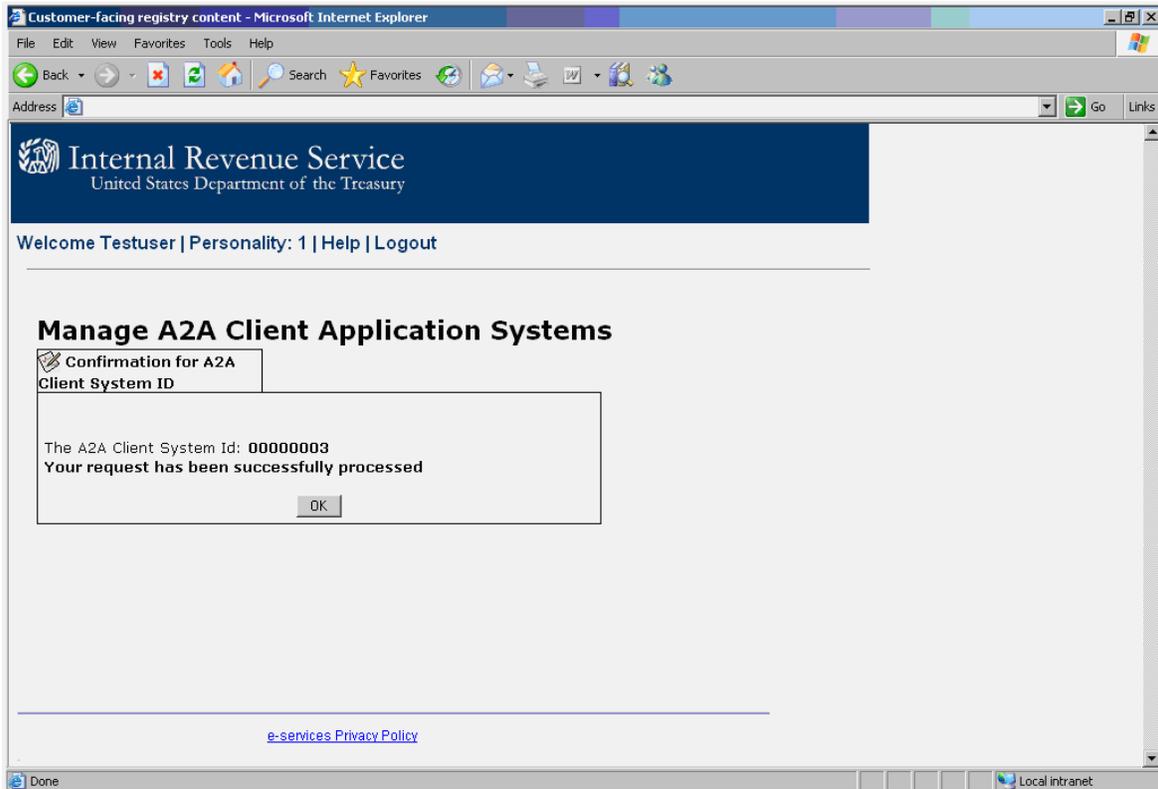
## 6.6. Confirmation Page

The confirmation page below is displayed if the system ID is updated successfully. The confirmation page contains the following information:

- A2A Client System ID that was updated.
- Message saying the update was successful.
- **OK** button. Clicking on the **OK** button returns the user back to the AE Landing Page.

**Note:** The update is a real time function, the changes made to this ASID is effective immediately.

The Figure 6-6 Confirmation Page for Editing an ASID depicts the confirmation page for editing an existing ASID.



**Figure 6-6 Confirmation Page for Editing an ASID**

## 7. Un-enroll Existing A2A Client System ID

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The AE application allows the authorized delegated user to un-enroll an existing ASID. In order to un-enroll the current status of the ASID must be one of the following; new, active or inactive. This is done by editing the ASID and changing the status of the ASID to 'Un-enroll'. The details of this function are described in the section below.

Note: Once un-enrolled, this ASID will not be available for any further updates. However the authorized delegated user can view the read only details of this un-enrolled ASID. In addition this ASID will not be able to use any of the A2A web services.

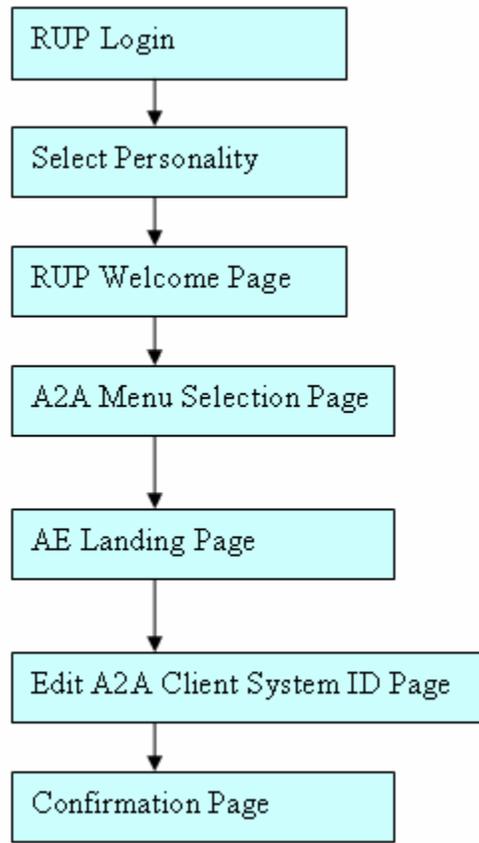
### 7.1. Prerequisites

In order to un-enroll an existing ASID, the authorized delegated user must have the user credentials to log into the RUP Portal. In addition the user must have the authority to access the AE application.

### 7.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the **Enrollment for A2A** link from the RUP Welcome Page. This takes the user to the A2A Menu selection page, from here the user then clicks on the **A2A Client Application Systems** link to access the AE Landing Page. From the AE landing page, the user locates the ASID to un-enroll and clicks on the **Edit** link under the *Action* column.

The Figure 7-1 Navigation to Un-enroll depicts the navigation for un-enrolling an existing ASID.



**Figure 7-1 Navigation to Un-enroll**

### 7.3. Required User Input

- A2A Client System ID Status: The AE application provides a drop down list box with the list of available statuses for an ASID. Refer to Table 2-4 Status Matrix from [Section 2-4](#).

### 7.4. User Action

- Type the URL for the RUP Portal <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid **user ID** and **password** to log in. Refer [Section 3-3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer [Section 3-3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on the **Application to Application** link from the RUP welcome page. Refer [Section 3-3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.
- Click on the **A2A Client Application Systems** link from the A2A menu selection page. Refer [Section 3-3](#) Registered User Portal Login, Figure 3-7 A2A Menu Selection Page.
- Locate the **ASID** to un-enroll and click on the **Edit** link under the **Action** column. The Figure 7-2 Accessing the ASID to un-enroll shows the edit link for an existing ASID.

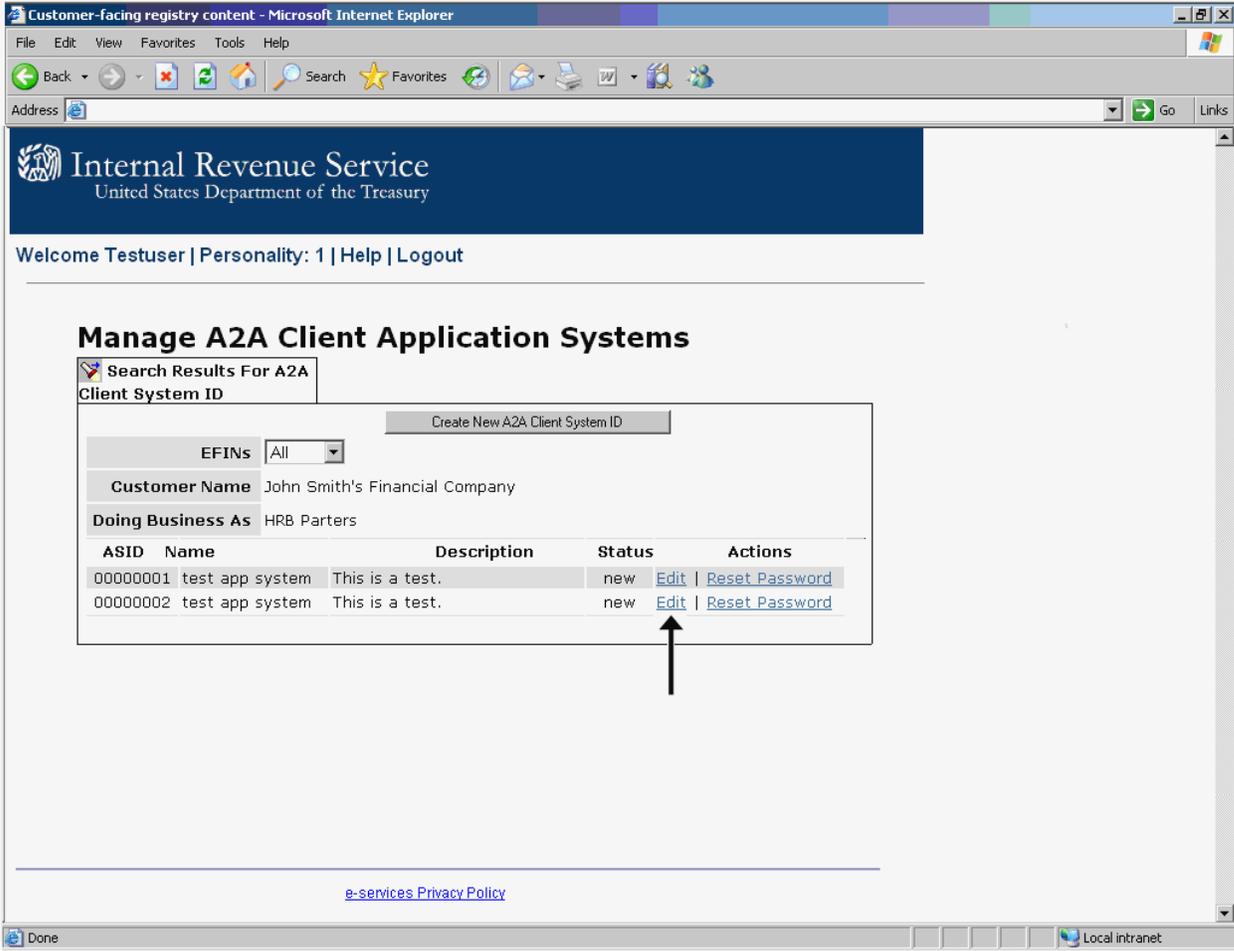


Figure 7-2 Accessing the ASID to un-enroll

- From the Edit A2A Client System ID Screen, set the **A2A Client System ID Status** to un-enroll by selecting the un-enroll status from the drop down list box. The Figure 7-3 Un-enroll Existing ASID shows the edit screen with the un-enroll value selected for the A2A Client System ID Status.

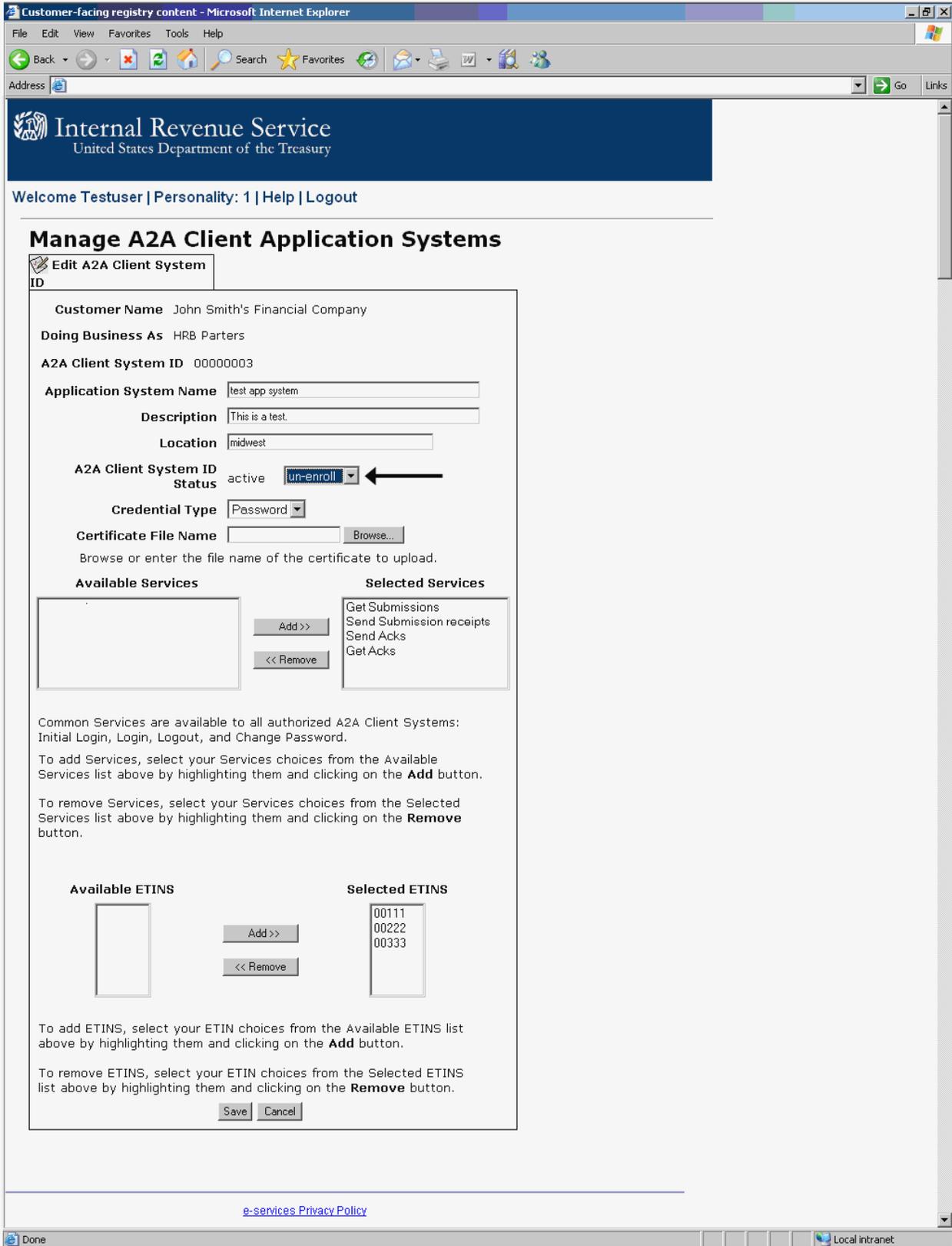


Figure 7-3 Un-enroll Existing ASID

- Click on the **Save** button to submit the request to un-enroll.
- The user has the option to cancel the request to un-enroll by clicking on the **Cancel** button. Clicking on the **Cancel** button will return the user back to the AE Landing Page.

## 7.5. Error Page

If the event of an error, the user is taken to an error page. The error page will display the error code and the description in red text. Follow the instructions on the screen and contact the IRS Help Desk with the details of the error message and error code displayed on the screen. Refer to Figure 6.5 AE System Error Message for Editing an ASID from [Section 6.5](#) for a sample error page.

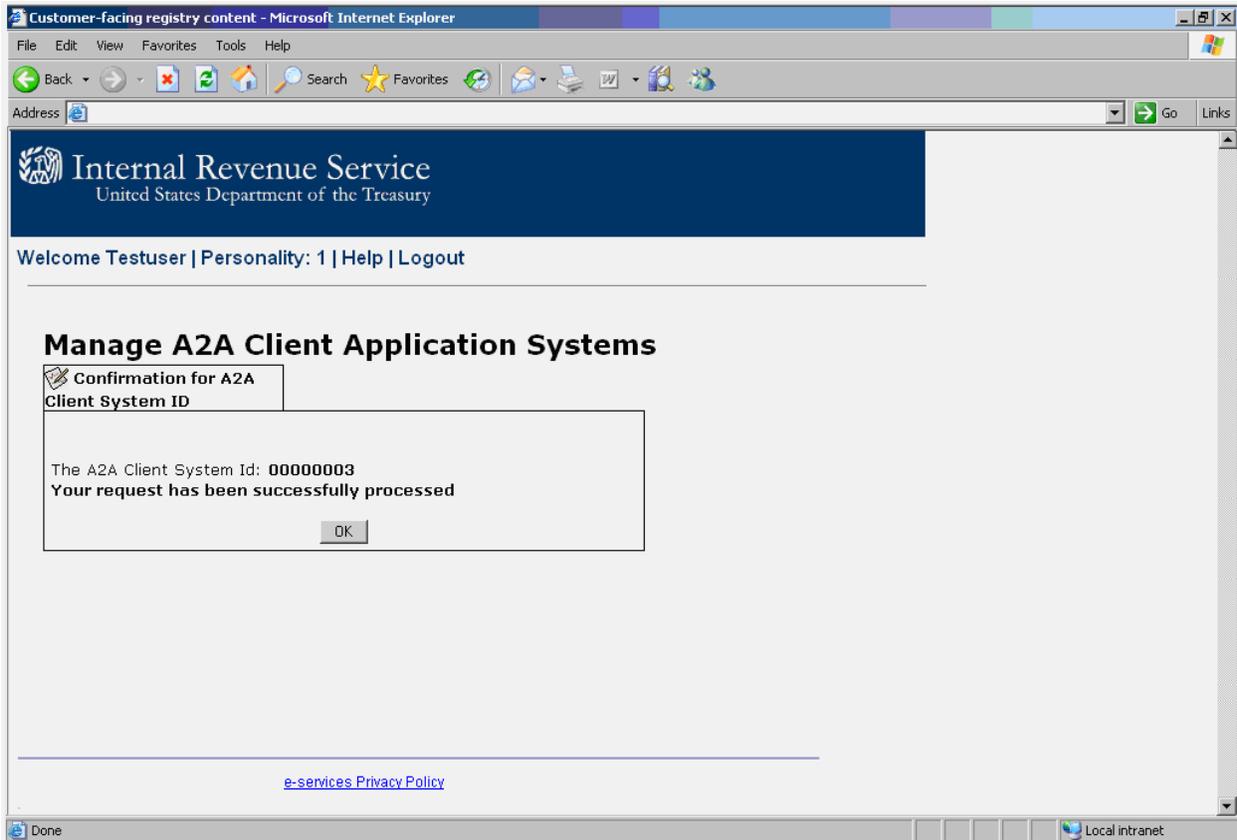
**Note:** Clicking on the **Back** button will return the user back to the AE Landing Page.

## 7.6. Confirmation Page

The confirmation page below is displayed if the un-enroll action is successful. The confirmation page contains the following information:

- A2A Client System ID that was un-enrolled.
- Text confirming the request was successful.
- **OK** button. Clicking on the **OK** button returns the user back to the AE Landing Page

The Figure 7-5 Confirmation Page for Un-enroll shows the confirmation screen for the UN-enroll request.



**Figure 7-5 Confirmation Page for Un-enroll**

**Important:** Un-enroll is a real time function, once an ASID is un-enrolled successfully, it will not be available for further updates. In addition this ASID will not be able to use any of the selected A2A Web Services.

## 8. Inactivate Existing A2A Client System ID

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The AE application allows the authorized delegated user to inactivate an existing ASID. To inactivate an ASID the current status of the ASID must be active. This is done by editing the ASID and changing the status of the ASID to 'inactivate'. The details of this function are described in the section below.

**Note:** Once inactivated, this ASID will not be able to use any of the A2A Web Services.

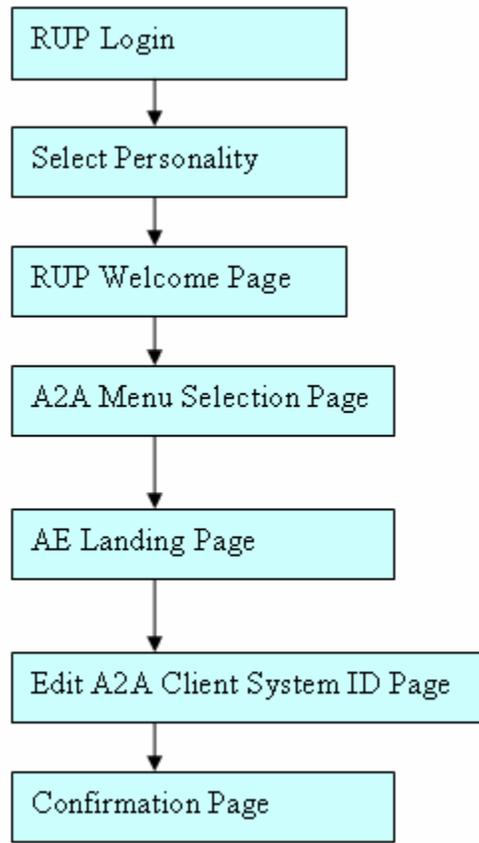
### 8.1. Prerequisites

In order to inactivate an existing ASID, the authorized delegated user must have the user credentials to log into the RUP Portal. The user must have the role to access the AE application.

### 8.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the **Application to Application** link from the RUP Welcome Page. This takes the user to the A2A Menu selection Page; from here the user clicks on the **A2A Client Application Systems** link to access the AE Landing Page. From the AE landing page, the user locates the ASID to inactivate and clicks on the **Edit** link under the Action column.

The Figure 8-1 Navigation to Inactivate depicts the navigation for inactivating an existing ASID.



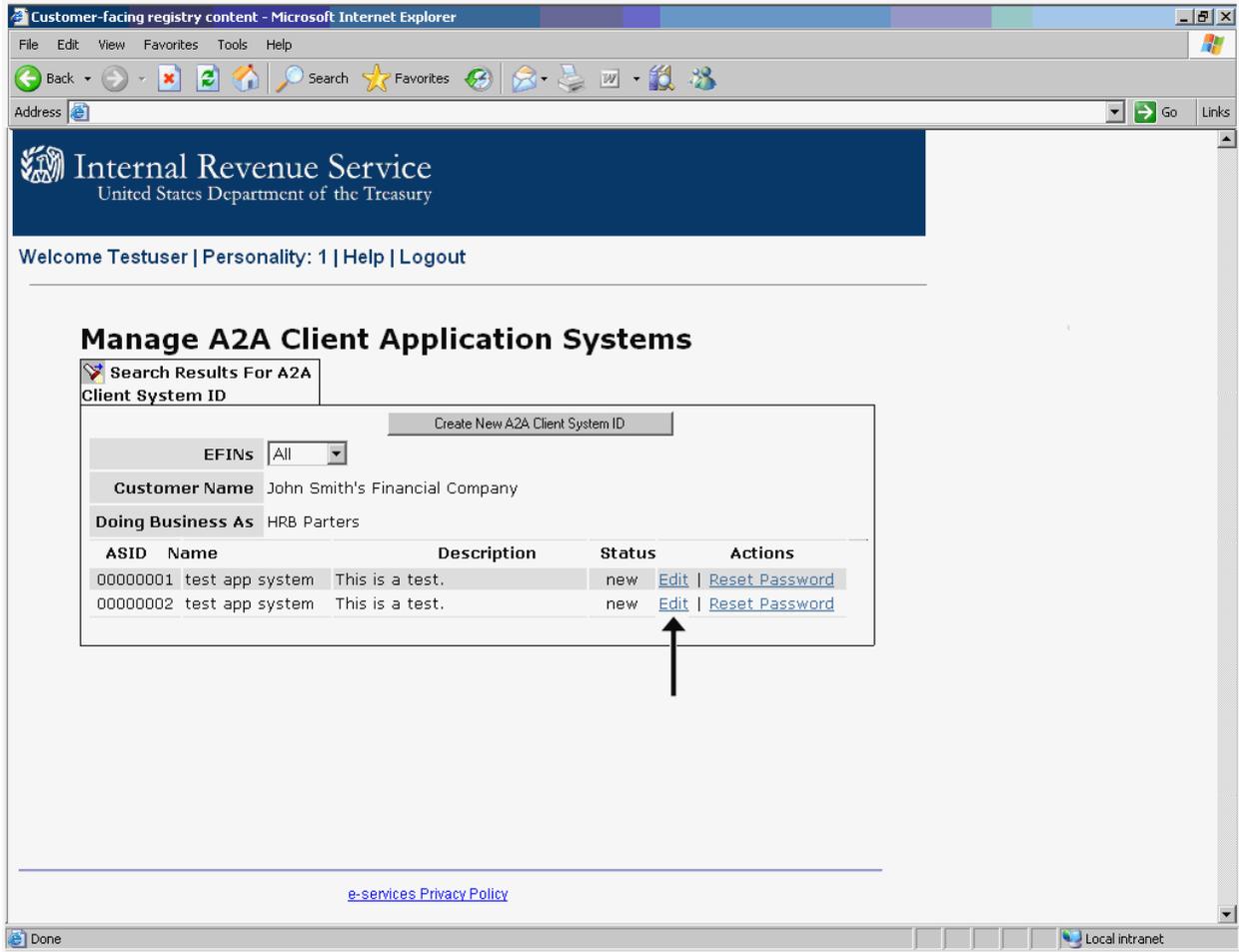
**Figure 8-1 Navigation to Inactivate**

### 8.3. Required User Input

- A2A Client System ID Status: The AE application provides a drop down list box with the list of available status for an ASID. Refer to Table 2-4 Status Matrix from [Section 2-4](#).

### 8.4. User Action

- Type the URL for the RUP Portal <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid **user ID** and **password** to log in. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on the **Application to Application** link from the RUP welcome page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.
- Click on the **A2A Client Application Systems** link from the A2A Menu selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3.7 A2A Menu Selection Page.
- Locate the ASID inactivate and click on the **Edit** link under the Action column. The Figure 8-2 Edit Link shows the edit link for an existing ASID.



**Figure 8-2 Edit Link**

- From the Edit A2A Client System ID Screen, set the A2A Client System ID Status to inactive by selecting the '**inactivate**' status from the drop down list box. The Figure 8-3 Inactivate Existing ASID below depicts the edit screen with the inactivate value selected for the A2A Client System ID Status.

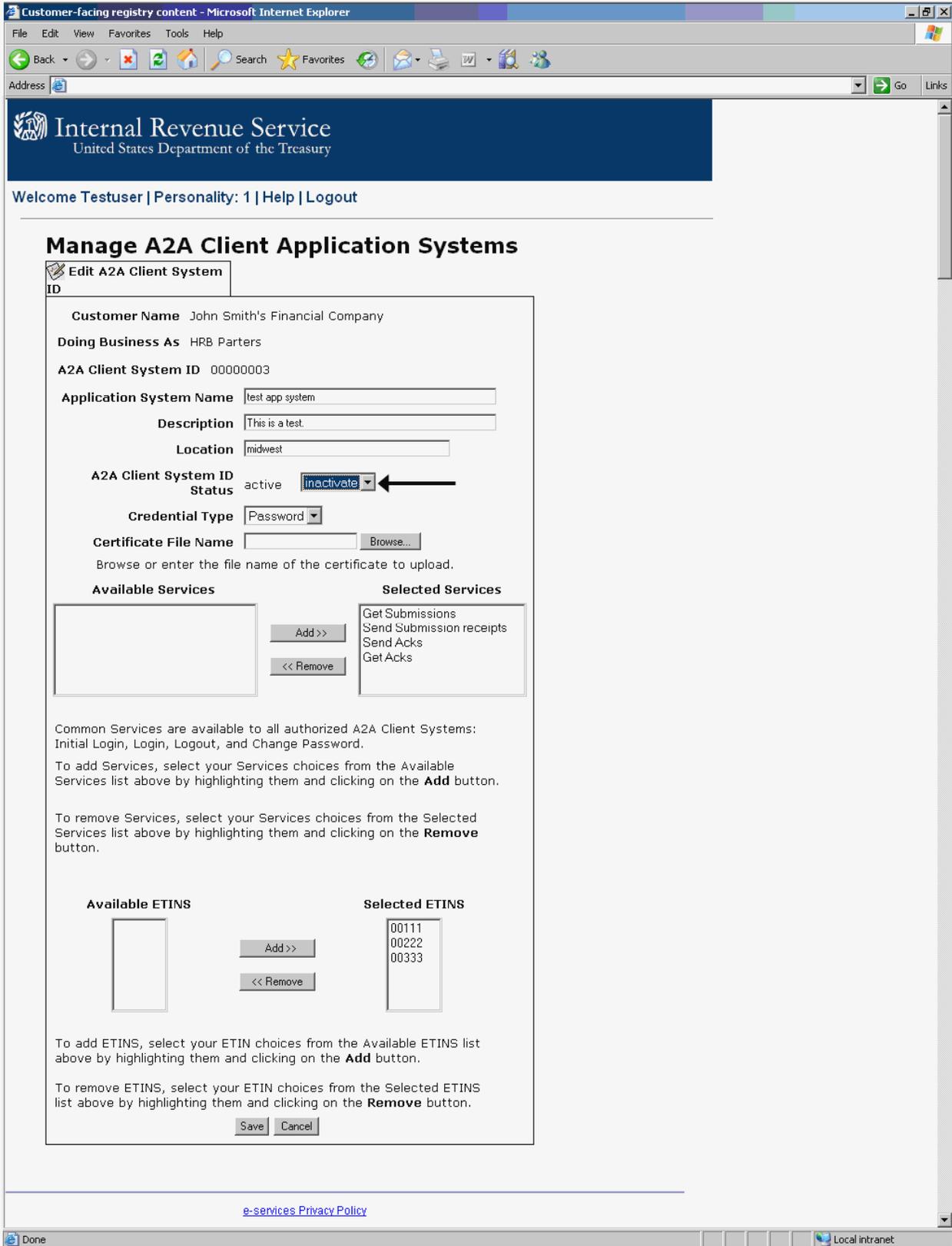


Figure 8-3 Inactivate Existing ASID

- Click on the save button to submit the request to inactivate.  
**Note:** Once an ASID is inactivated, it will not be able to use any of the A2A Web Services.
- The user has the option to cancel the request by clicking on the **Cancel** button. Clicking on the **Cancel** button returns the user back to the AE Landing Page.

## 8.5. Error Page

If the event of an error, the user is taken to an error page. The error page will display the error code and the description in red text. Follow the instructions on the screen and contact the IRS Help Desk with the details of the error message and error code displayed on the screen. Refer to Figure 6.5 AE System Error Message for Editing an ASID from [Section 6.5](#) for a sample error page.

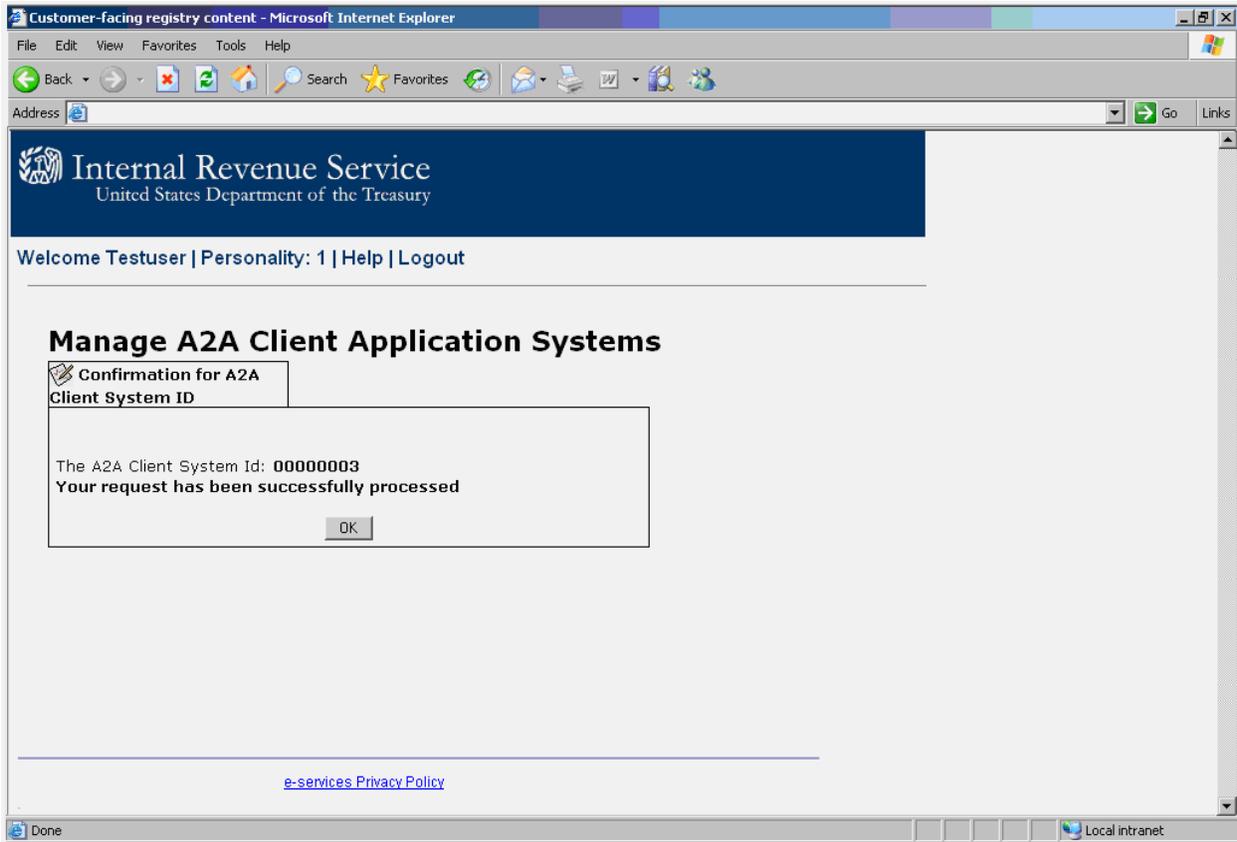
**Note:** Clicking on the **Back** button from the error screen returns the user back to the AE Landing Page.

## 8.6. Confirmation Page

The confirmation page below is displayed if the request to inactivate the ASID is successful. The confirmation page contains the following information:

- A2A Client System ID that was inactivated.
- Text confirming the request was successful processed.
- **OK** button, clicking on the **OK** button returns the user back to the search results page.

The Figure 8-4 Confirmation Screen for Inactivating an ASID depicts the confirmation screen for inactivating an existing ASID.



**Figure 8-4 Confirmation Page for Inactivating**

**Note:** Inactivate is a real time function, once an ASID is inactivated successfully, it will not be able to use any of the selected A2A Web Services.

## 9. Activate Existing A2A Client System ID

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The AE application allows the authorized delegated user to activate a previously 'inactivated' ASID. This is done by editing the ASID and changing the status of the ASID to 'activate'. The section below describes the navigation and the process for activating an ASID.

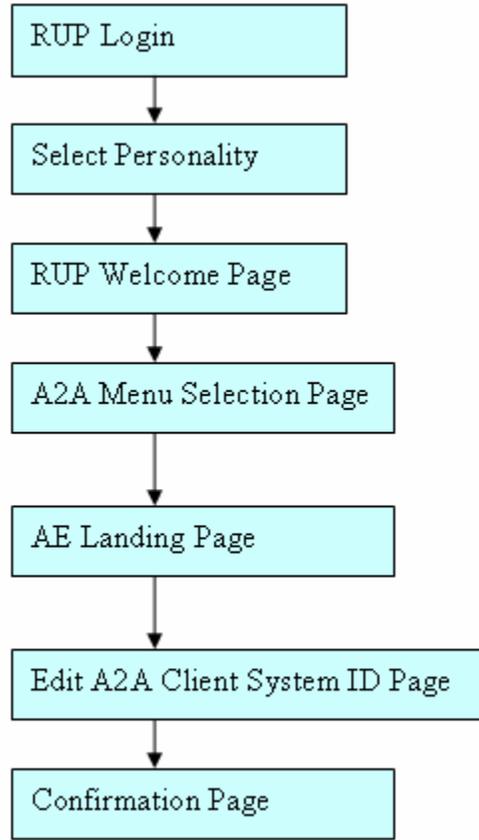
### 9.1. Prerequisites

In order to activate an existing ASID, the authorized delegated user must have the user credentials to log into the RUP Portal. In addition the user must have the role to access the AE application.

### 9.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the **Application to Application** link from the RUP Welcome Page. This takes the user to the A2A Menu selection Page; from here the user clicks on the **A2A Client Application Systems** link to access the AE Landing Page. From the AE landing page, the user locates the ASID to activate and clicks on the **Edit** link under the *Action* column.

The Figure 9-1 Navigation to Activate depicts the navigation for activating an existing ASID.



**Figure 9-1 Navigation to Activate**

### 9.3. Required User Input

- A2A Client System ID Status: The AE application provides a drop down list box with the list of available status for an ASID. Refer to Table 2-4 Status Matrixes from [Section 2-4](#).

### 9.4. User Action

- Type the URL for the RUP Portal <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid **user ID** and **password** to log in. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on the **Application to Application** link from the RUP welcome page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.
- Click on the **A2A Client Application** Systems link from the A2A Menu Selection Page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-7 A2A Menu Selection Page.
- Locate the ASID activate and click on the **Edit** link under the **Action** column. The Figure 9-2 Accessing the ASID to Activate shows the ASID with the edit link selected for an existing ASID.

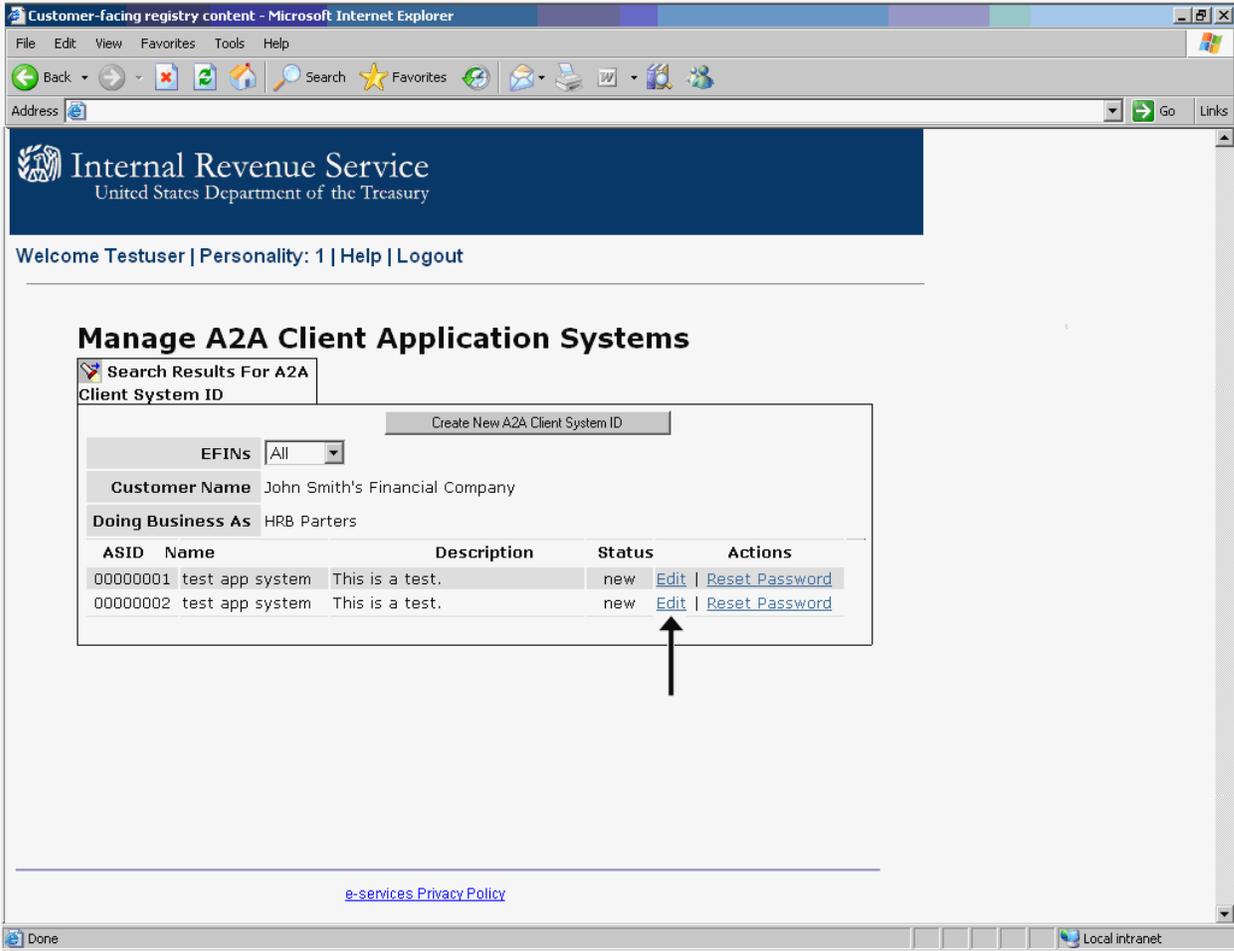


Figure 9-2 Accessing the ASID to Activate

- From the Edit A2A Client System ID Screen, set the A2A Client System ID Status to activate by selecting the **activate** status from the drop down list box. The Figure 9-3 Activate Existing ASID depicts the edit screen with the activate value selected for the A2A Client System ID Status.

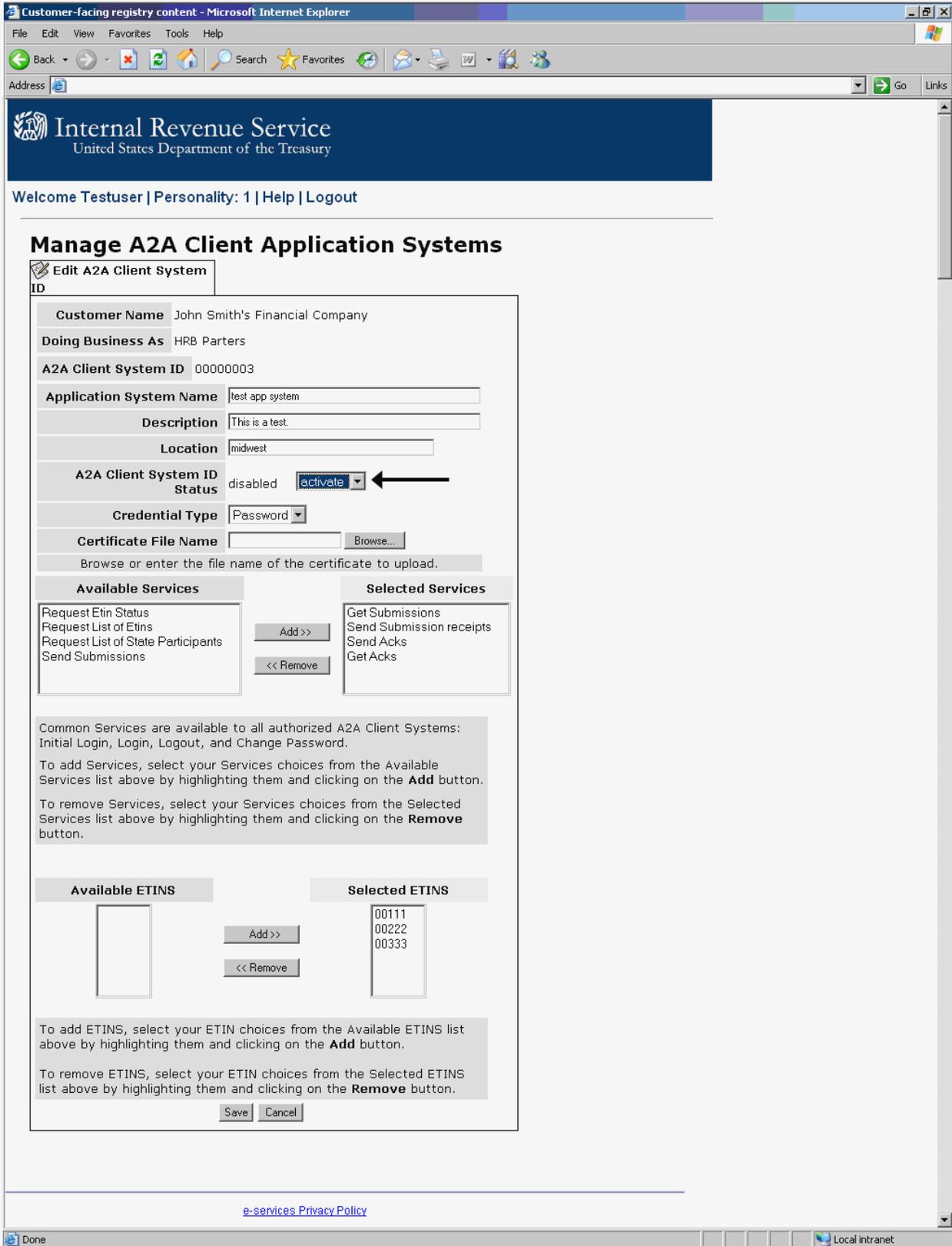


Figure 9-3 Activate Existing ASID

- Click on the **Save** button to submit the request to activate.
- The user has the option to cancel the request by clicking on the **Cancel** button. Clicking on the **Cancel** button returns the user back to the AE Landing Page.

## 9.5. Error Page

In the event of a system error, the user will be taken to an error page with the details of the error in red text. Follow the instructions on the screen and call the IRS Help Desk if needed with the details of the error message. Refer to Figure 6.5 AE System Error Message for Editing an ASID from [Section 6.5](#) for a sample error page.

**Note:** Clicking on the **Back** button from the error screen returns the user back to the AE Landing Page.

## 9.6. Confirmation Page

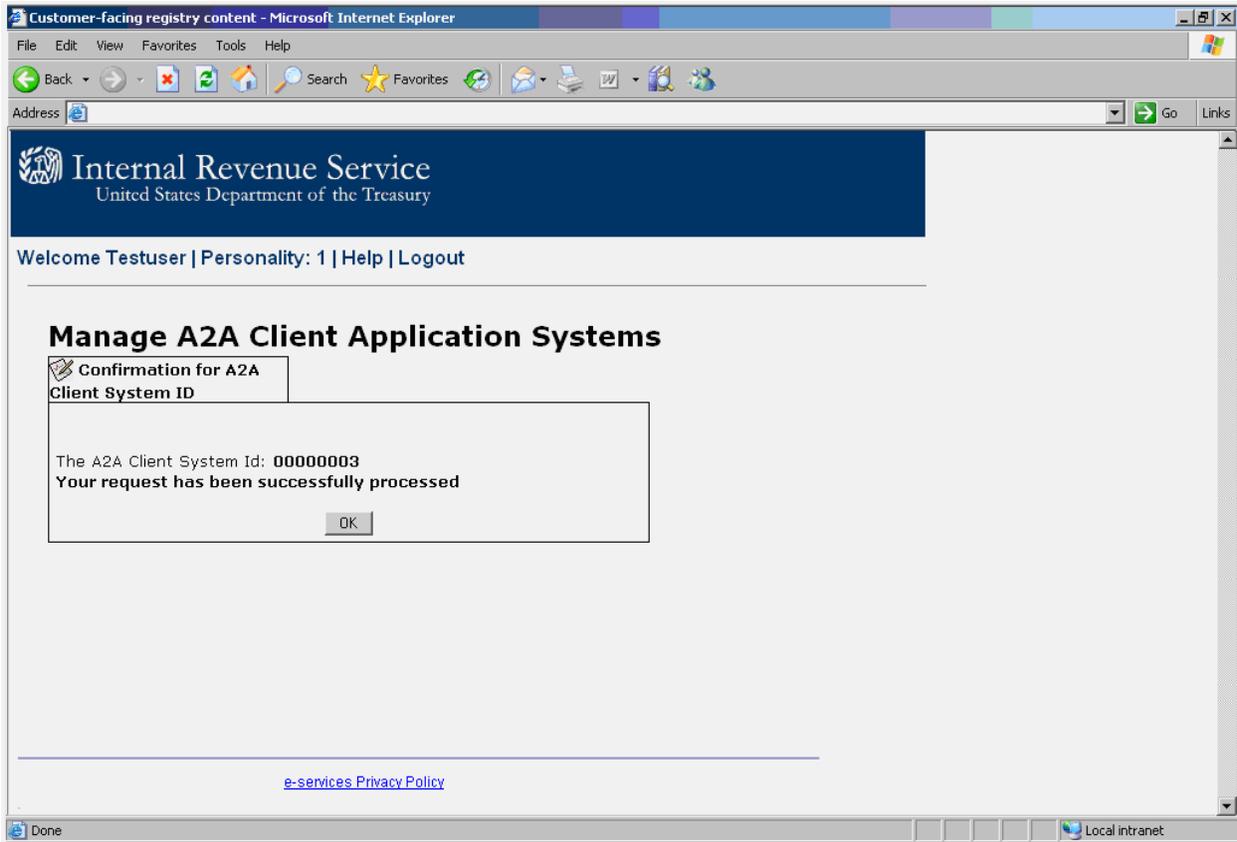
The confirmation page below is displayed if the request to activate the ASID is successful. The confirmation page contains the following information:

- A2A Client System ID that was activated.
- Text confirming the request was processed successfully.
- **OK** button. Clicking on the **OK** button returns the user back to the Search Results Screen. See Figure 9-4 Confirmation Page for Activating.

Activate is a real time function. The status change is effective immediately. Once an ASID is activated successfully, it will be able to use the selected A2A Web Services.

**Note:** The delegated user must invoke the change password web service request for the ASID that was activated if it is more than 30 days since the last login web service was invoked.

The Figure 9-4 Confirmation Page for Activating depicts the confirmation screen for activating an existing ASID.



**Figure 9-4 Confirmation Page for Activating**

## 10. Reset Password for an Application System ID

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The authorized delegated user has the option to reset the password for an existing ASID. The section below describes the navigation and the process for resetting the password.

**Note:** Password reset is a real time function; it replaces the old password of an ASID with the new auto generated password. Upon successful password reset, the new password will be displayed on the confirmation screen.

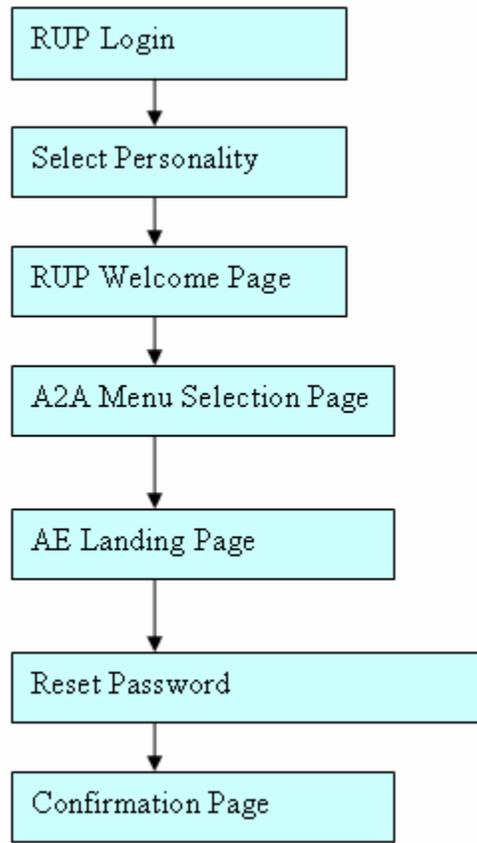
### 10.1. Prerequisites

In order to reset the password for an existing ASID, the authorized delegated user must have the user credentials to log into the RUP Portal. The user must have the role to access the AE application.

### 10.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the **Application to Application** link from the RUP Welcome Page. This takes the user to the A2A menu selection page; from here the user clicks on the **A2A Client Application Systems** link to access the AE Landing Page. From the AE landing page, the user locates the ASID and clicks on the **Reset Password** link to under the Action column.

The Figure 10-1 below depicts the navigation for resetting the password for an existing A2A Client System ID.



**Figure 10-1 Navigation to Reset Password**

### 10.3. Required User Input

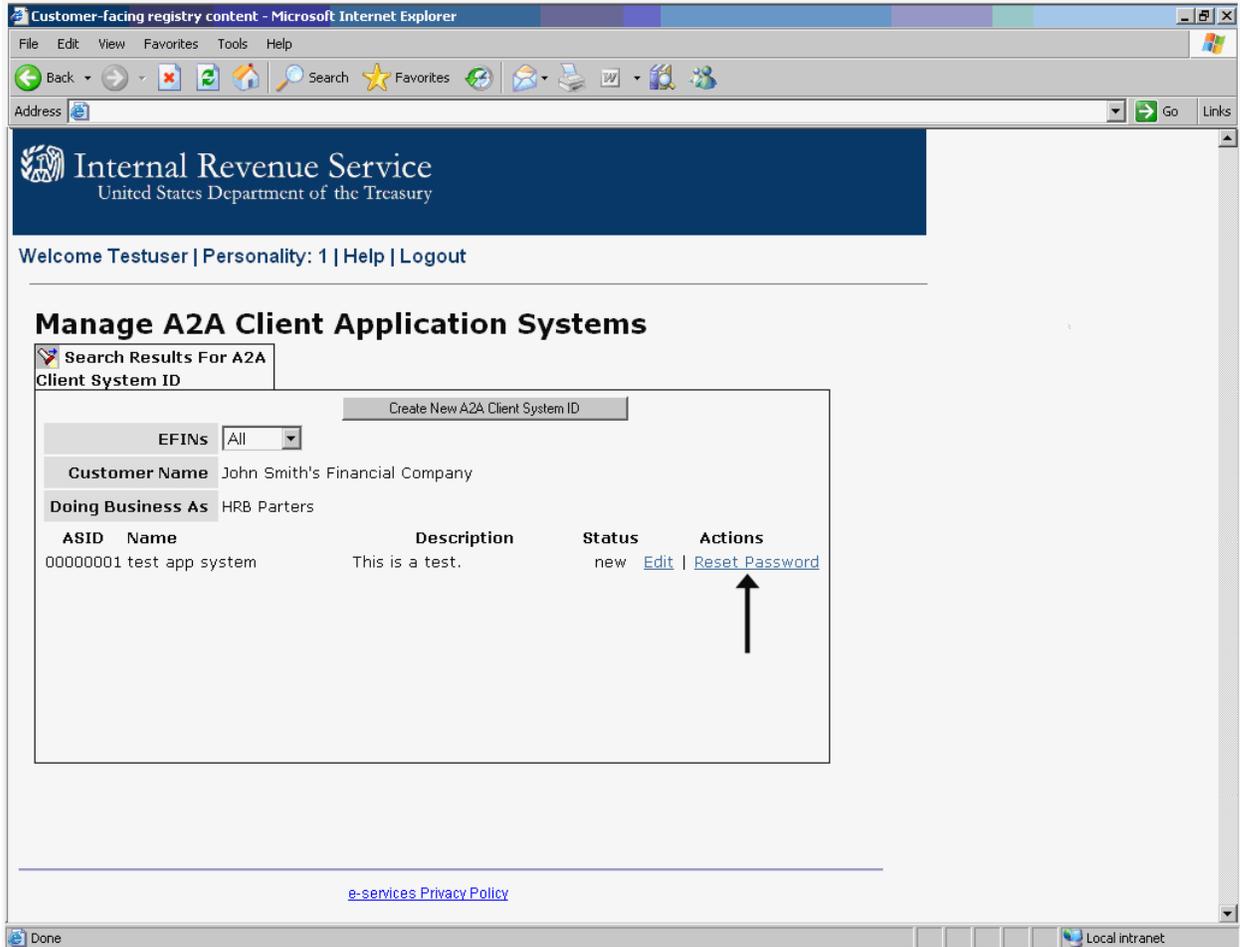
- Not Applicable

### 10.4. User Action

To reset the password for an ASID, the authorized delegated user performs the following actions:

- Type the URL for the RUP Portal <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid **user ID** and **password** to log in. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on the **Application to Application** link from the RUP welcome page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.
- Click on the **A2A Client Application Systems** link from the A2A Menu selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-7 A2A Menu Selection Page.

- Locate the ASID activate and click on the **Reset Password** link under the Action column. The Figure 10-2 Reset Password Link shows the reset password link for an existing ASID.



**Figure 10-2 Reset Password Link**

- Click on the **OK** button from the pop up Confirmation page to submit the request to reset the password. Figure 10-3 below shows the pop up confirmation screen.



**Figure 10-3 Reset Password Pop up Confirmation Page**

- The user has the option to cancel the request to reset the password. Clicking on the **Cancel** button will take the user back to the AE Landing Page.

## 10.5. Error Page

If the event of an error, the user is taken to an error page. The error page will display the error code and the description in red text. Follow the instructions on the screen and contact the IRS Help Desk with the details of the error message and error code displayed on the screen. Refer to Figure 6.5 AE System Error Message for Editing an ASID from [Section 6.5](#) for a sample error page.

**Note:** Clicking on the **Back** button from the error screen returns the user back to the AE Landing Page.

## 10.6. Confirmation Page

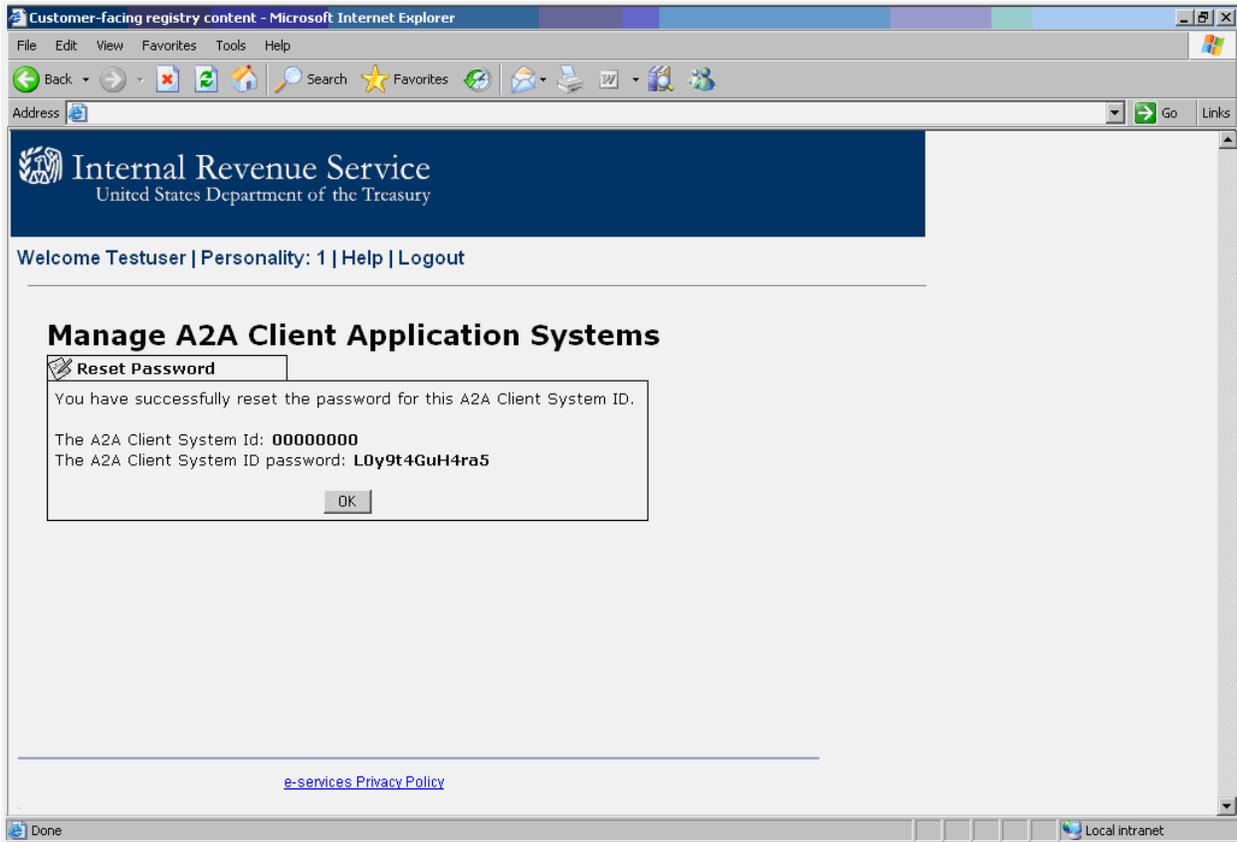
The confirmation page below is displayed if the reset password for the A2A Client System ID is successfully processed. The reset password confirmation page contains the following information:

- Application System ID
- Password
- Text confirming that reset password was successful.
- **OK** button. Clicking on the **OK** button returns the user back to the Search Results Screen.

Reset Password is a real time function; it replaces the old password of an ASID with the new auto generated password.

**Important:** The delegated user must remember to invoke the Login, ChangePassword and Logout A2A Web Service request using the ASID and password provided above in the confirmation screen.

The Figure 10-4 Reset Password Confirmation Screen depicts the confirmation screen for resetting the password for an existing ASID.



**Figure 10-4 Reset Password Confirmation Page**

## 11. Replace Certificate for an existing ASID

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The replace certificate function allows the authorized delegated user to replace the certificate for an existing ASID..

**Note:** Replace Certificate is a real time function; it replaces the old certificate of an ASID with the new certificate uploaded by the user.

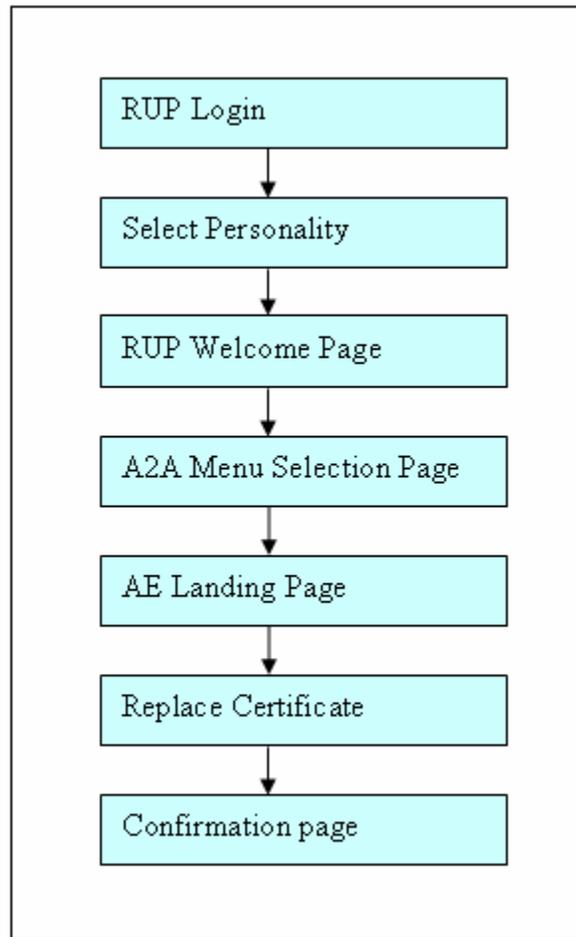
### 11.1. Prerequisites

In order to replace the certificate for an existing ASID, the authorized delegated user must have the user credentials to log into the RUP Portal. The user must have the role to access the AE application. In addition the authorized delegated user must have the new certificate file.

### 11.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the **Application to Application** link from the RUP Welcome Page. This takes the user to the A2A menu selection page; from here the user clicks on the **A2A Client Application Systems** link to access the AE Landing Page. From the AE landing page, the user locates the ASID and clicks on the **Replace Certificate** link to under the Action column.

The Figure 11-1 below depicts the navigation for replacing the certificate for an existing A2A Client System ID.



**Figure 11-1 Navigation to Replace Certificate**

### 11.3. Required User Input

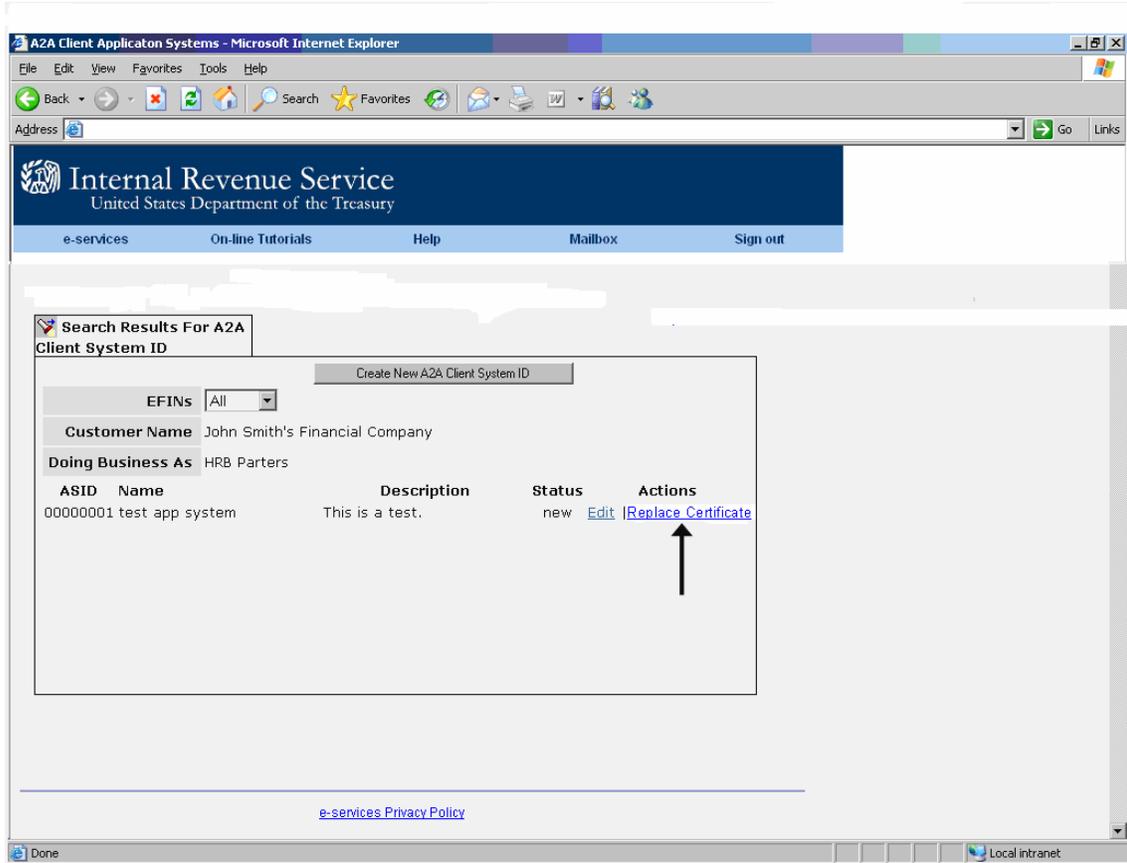
- Certificate File

### 11.4. User Action

To replace the certificate for an ASID, the authorized delegated user performs the following actions:

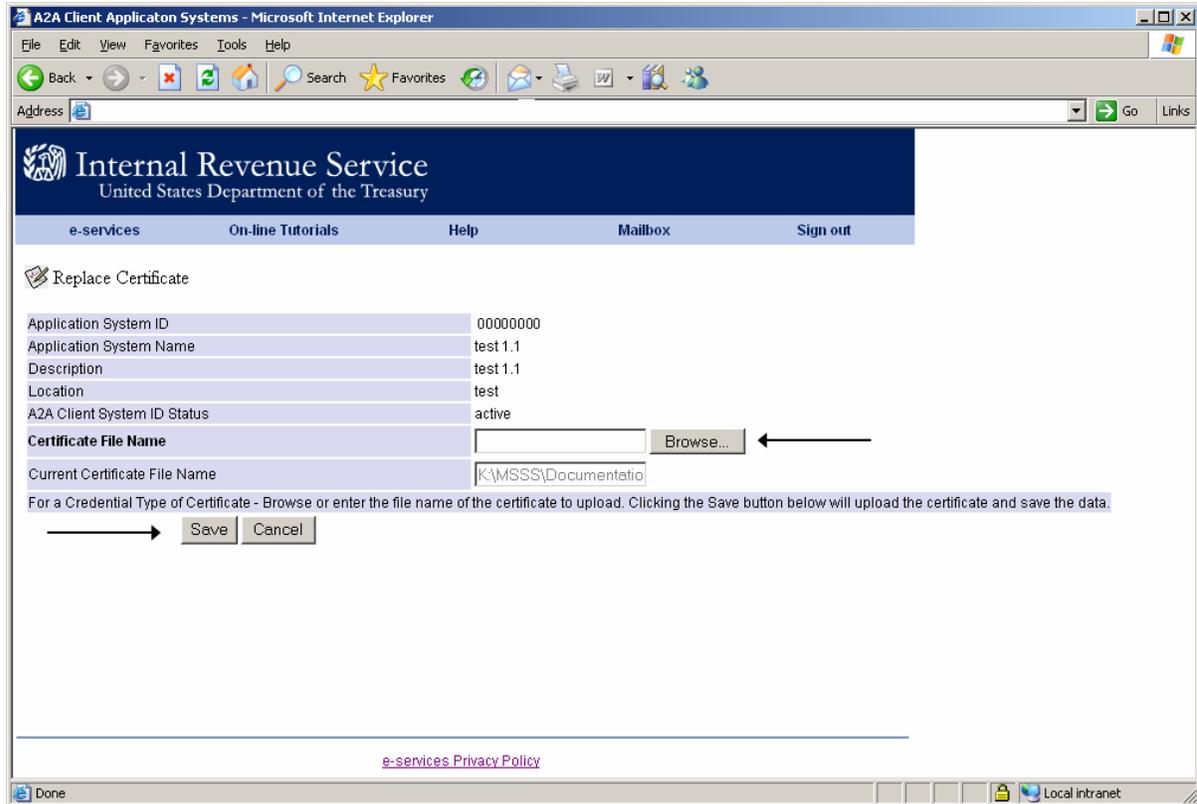
- Type the URL for the RUP Portal <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid **user ID** and **password** to log in. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on the **Application to Application** link from the RUP welcome page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.

- Click on the **A2A Client Application Systems** link from the A2A Menu selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-7 A2A Menu Selection Page.
- Locate the ASID activate and click on the **Replace Certificate** link under the Action column. The Figure 11-2 Replace Certificate Link shows the replace certificate link for an existing ASID.



**Figure 11-2 Replace Certificate Link**

- From the Replace Certificate screen, click on the **Browse** button to upload the new certificate file and click on the **Save** button. The figure 11-3 Replace Certificate screen depicts the screen for replacing the certificate for the selected ASID.



**Figure 11-3 Replace Certificate Screen**

- Click on the **Save** button to submit the request to replace the certificate.
- The authorized delegated user has the option to cancel the transaction by clicking on the **Cancel** button. This action returns the user back to the Search Results screen.
- The authorized delegated user is taken to confirmation screen upon success. See Figure 11-4 Confirmation Screen for Replacing the Certificate.

## 11.5. Error Screen

In the event of an error, the user is taken to an error page. The error page will display the error code and the description in red text. Follow the instructions on the screen and contact the IRS Help Desk with the details of the error message and error code displayed on the screen. Refer to Figure 6.5 AE System Error Message for Editing an ASID from [Section 6.5](#) for a sample error page.

**Note:** Clicking on the **Back** button from the error screen returns the user back to the AE Landing Page.

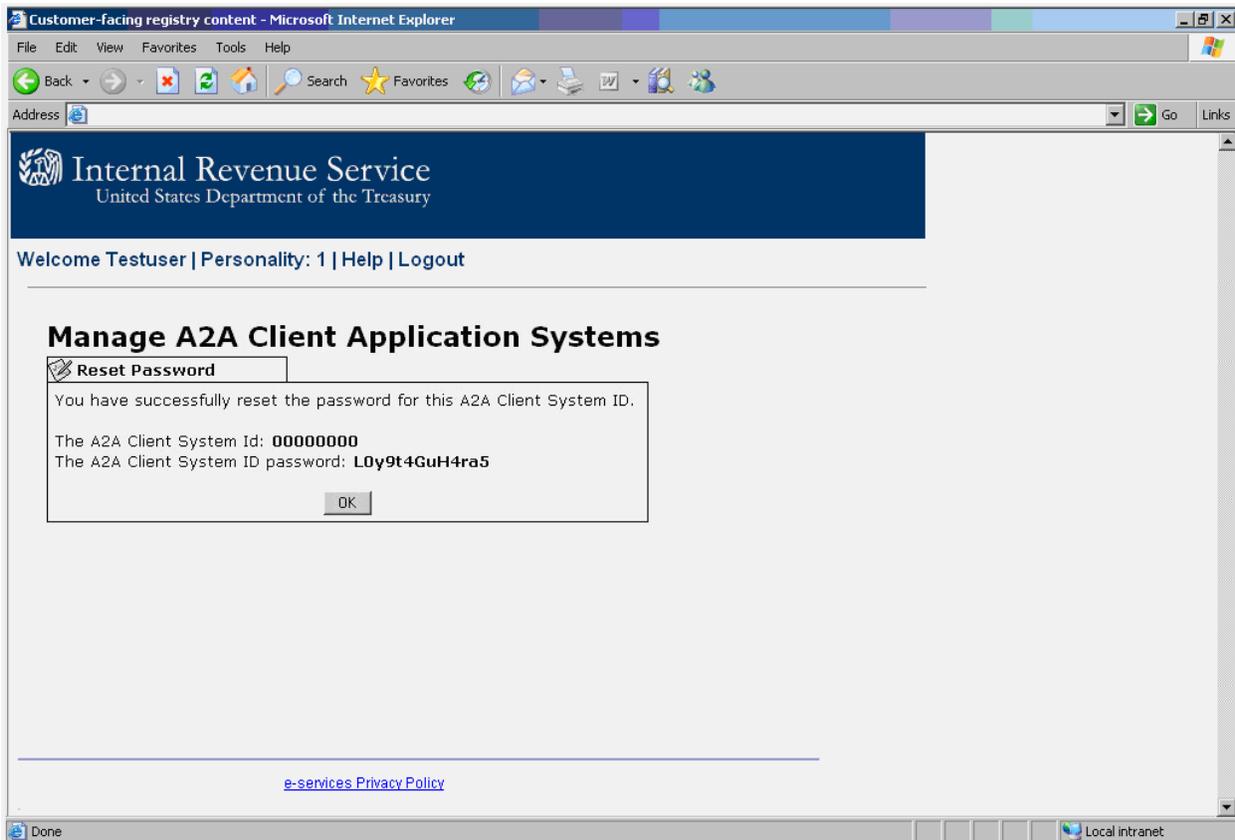
## 11.6. Confirmation Screen

The confirmation screen below is displayed if the request to replace the certificate for the selected ASID is successfully processed. The confirmation page contains the following information:

- Application System ID
- Text confirming the request was successful.
- **OK** button. Clicking on the **OK** button returns the user back to the Search Results screen.

Note: Replacing the certificate is a real time function. Upon successful processing the current certificate is replaced with the new certificate. The old certificate will no longer be valid. The authorized delegated user must remember to use the new certificate for any A2A Web Services request.

The Figure 11-4 Confirmation Screen for Replacing Certificate depicts the confirmation screen for replacing the certificate for an existing ASID



**Figure 11-4 Replace Certificate Confirmation Page**

## 12. Change the Credential Type from Password to Certificate

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This function allows the authorized delegated user to change the credential type for an existing ASID from password to certificate or from certificate to password. The section below describes the navigation and the process for changing the credential type of an ASID from password to certificate.

Note: Changing the credential type is a real time function; the changes requested are effective immediately.

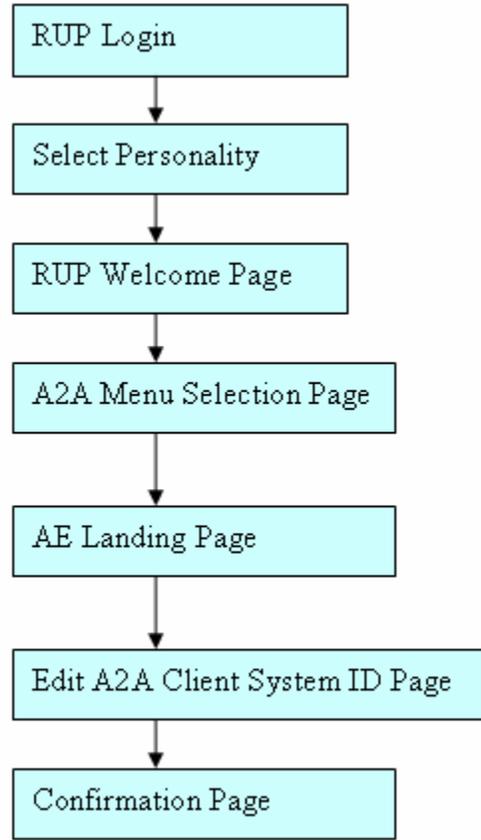
### 12.1. Prerequisites

In order to change the credential type for an existing ASID, the authorized delegated user must have the user credentials to log into the RUP Portal. In addition the user must have the role to access the AE application.

### 12.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the **Application to Application** link from the RUP Welcome Page. This takes the user to the A2A Menu Selection Page; from here the user clicks on the **A2A Client Application Systems** link to access the AE Landing Page. From the AE landing page, the user locates the ASID to activate and clicks on the **Edit** link under the Action column.

The Figure 12-1 Navigation to Change the Credential type to Certificate depicts the navigation for changing the credential type to certificate for an existing ASID.



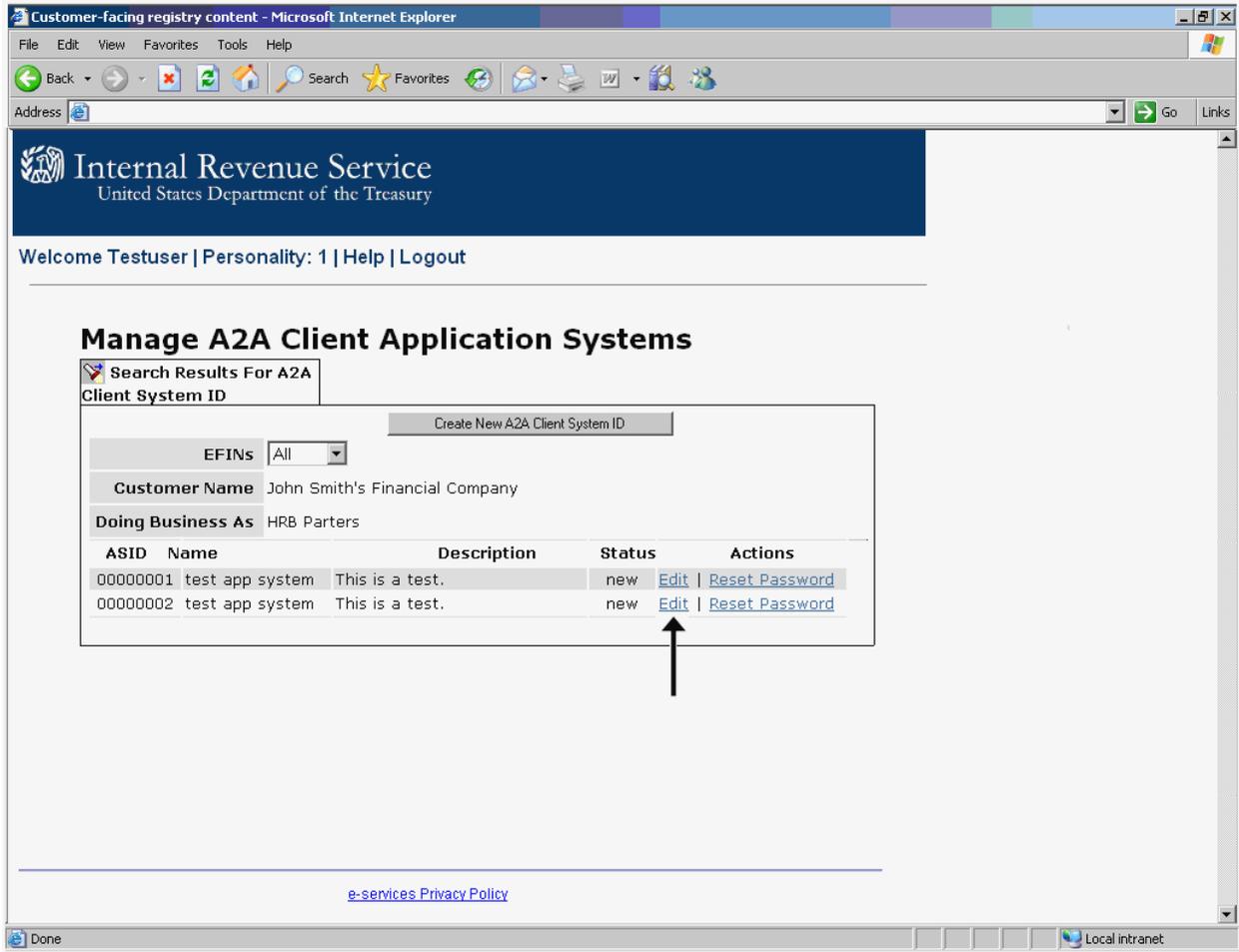
**Figure 12-1 Navigation to Change the Credential type to Certificate**

### 12.3. Required User Input

- **Certificate File Name:** The name and location of the certificate file.

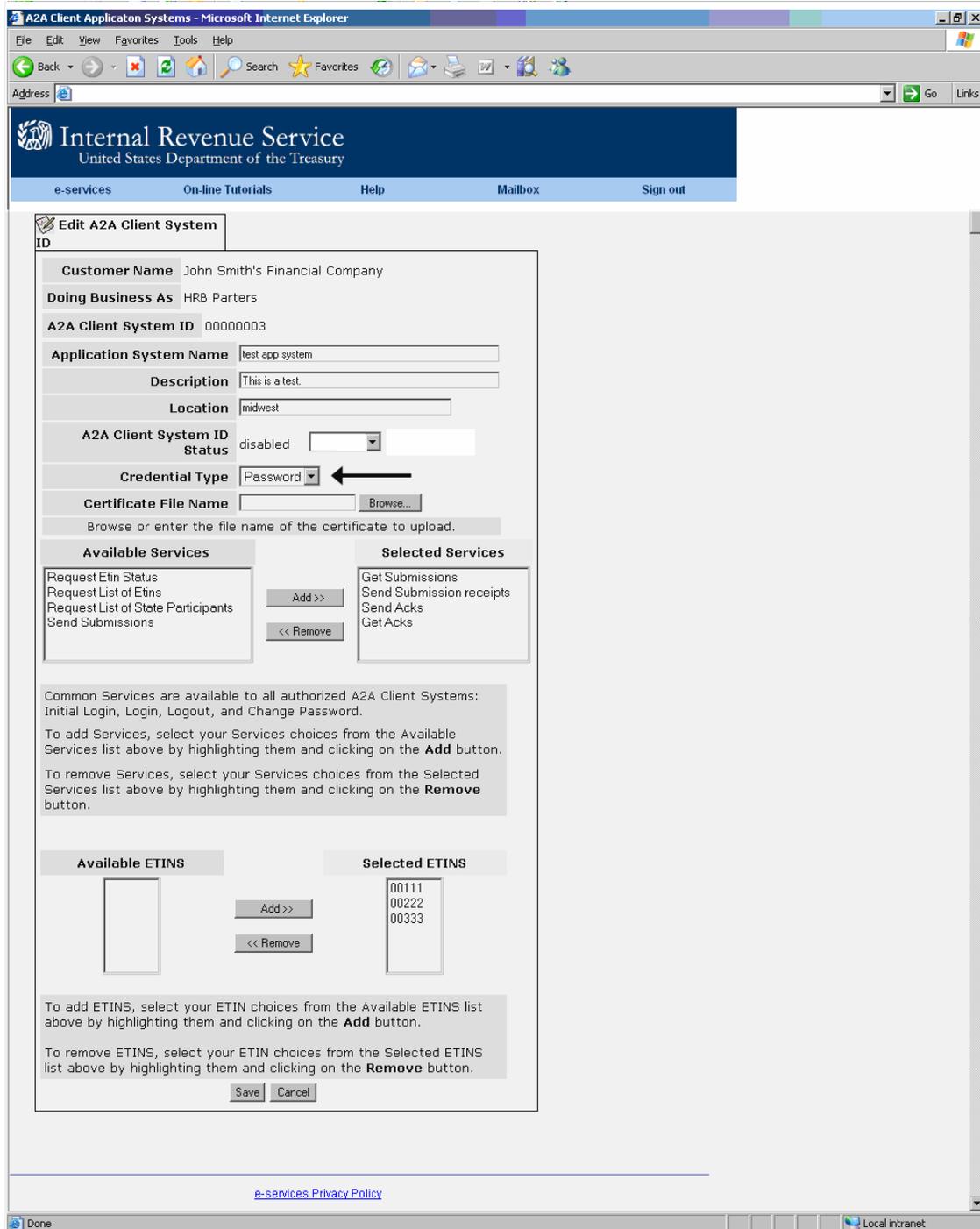
### 12.4. User Action

- Type the URL for the RUP Portal <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid **user ID** and **password** to log in. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on the **Application to Application** link from the RUP welcome page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.
- Click on the **A2A Client Application** Systems link from the A2A Menu Selection Page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-7 A2A Menu Selection Page.
- Locate the ASID and click on the **Edit** link under the **Action** column. The Figure 9-2 Accessing the ASID to Activate shows the ASID with the edit link selected for an existing ASID.



**Figure 12-2 Accessing the ASID to Edit**

- From the Edit A2A Client System ID Screen, change the Credential Type to certificate and upload the certificate file by clicking on the Browse button next to the Certificate File Name field. The Figure 12-3 Changing the Credential Type to Certificate depicts the edit screen with the changes for the selected A2A Client System ID.



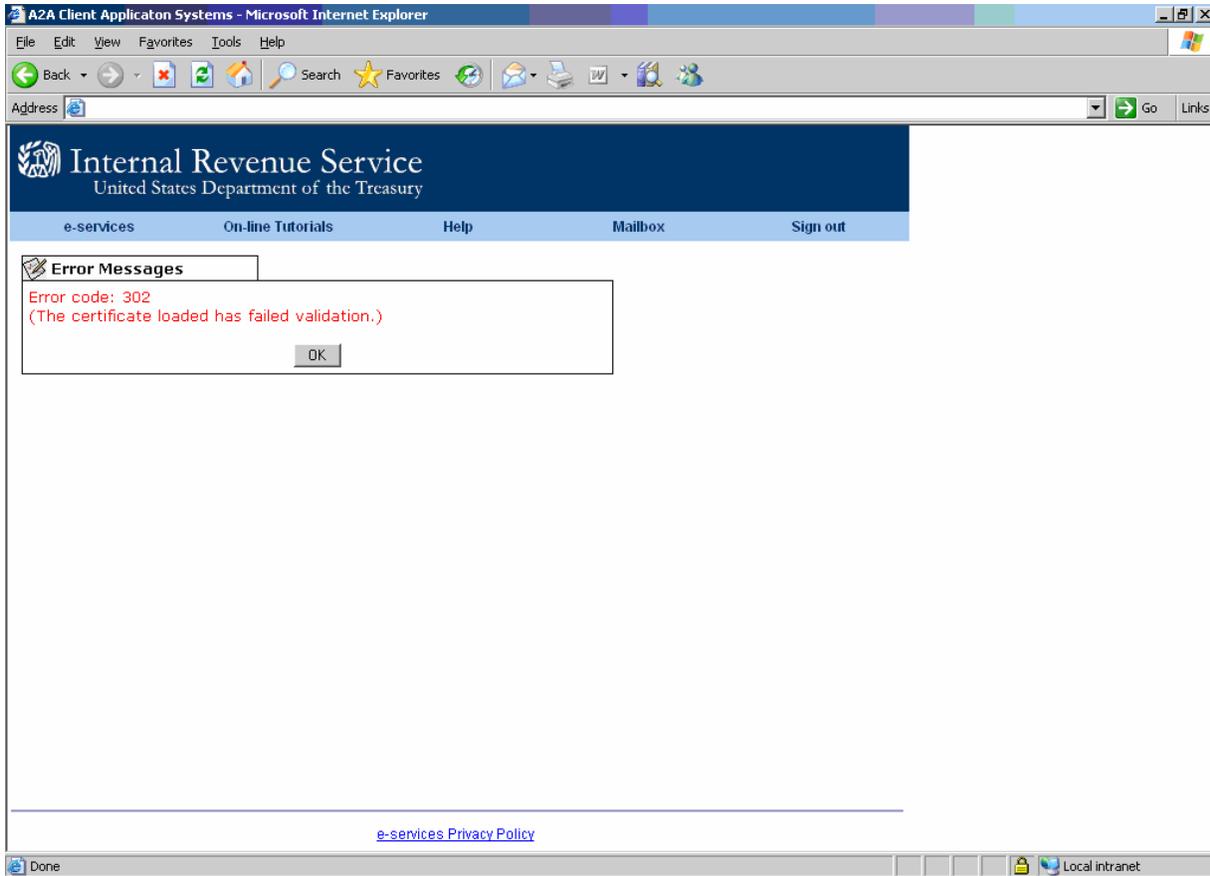
**Figure 12-3 Changing the Credential Type to Certificate**

- Click on the **Save** button to submit the request to activate.
- The user has the option to cancel the request by clicking on the **Cancel** button. Clicking on the **Cancel** button returns the user back to the AE Landing Page.

## 12.5. Error Page

In the event of a system error, the user will be taken to an error page with the details of the error in red text. Click on the OK button to return to the previous page. The user has the option to fix the error and try again or cancel the request.

The Figure 12.4 Certificate Validation Error Page depicts an error page where the user request failed with certificate validation error.



**Figure 12-4 Certificate Validation Error Page**

**Note:** Clicking on the **OK** button from the error screen returns the user back to the previous page.

## 12.6. Confirmation Page

The confirmation page below is displayed if the request to change the credential type is successful. The confirmation page contains the following information:

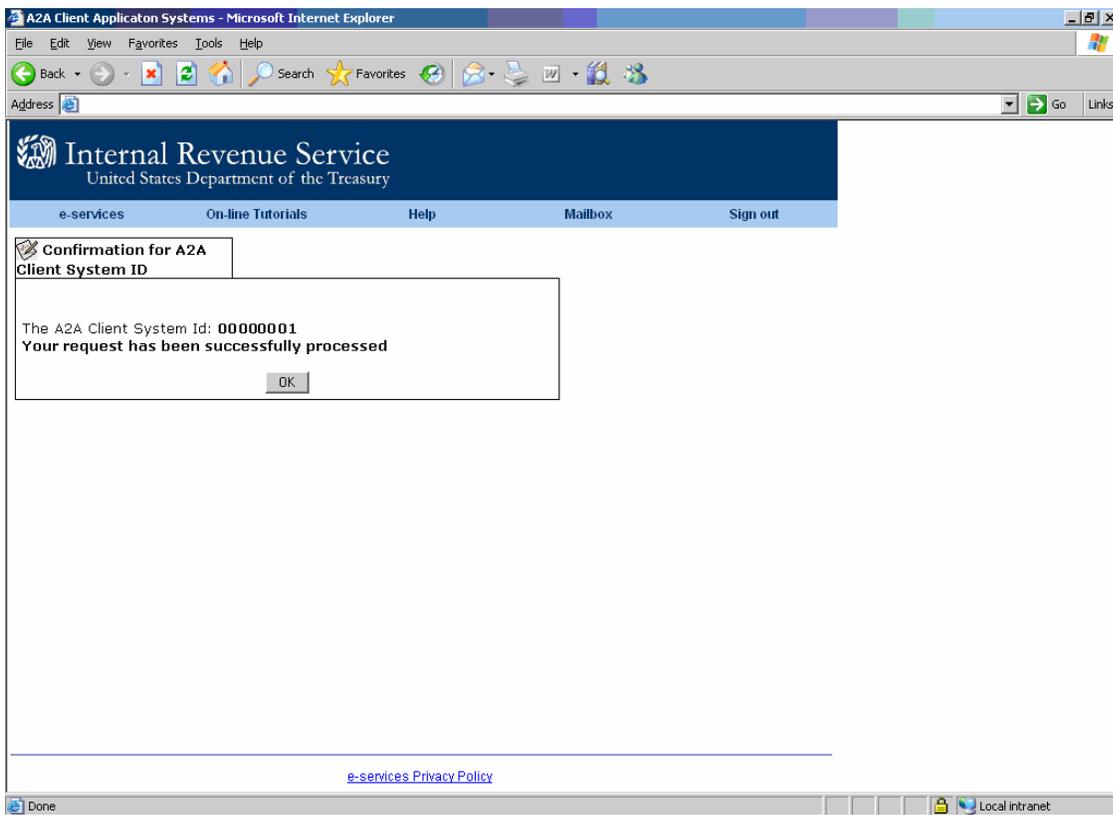
- A2A Client System ID.

- Text confirming the request was processed successfully.
- **OK** button. Clicking on the **OK** button returns the user back to the Search Results Screen. See Figure 12-5 Confirmation Page for Activating.

Changing the credential type is a real time function. The changes requested are effective immediately. It replaces the credential type of the ASID to certificate and updates the password information with the certificate information.

**Note:** The delegated user must remember to invoke the web service request using the Certificate as credentials. Please note that the old password will no longer work.

The Figure 12-4 Confirmation Page for Changing the Credential Type to Certificate depicts the confirmation screen for changing the credential type to certificate.



**Figure 12-5 Confirmation Page**

## 13. Change the Credential Type to Password

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This function allows the authorized delegated user to change the credential type for an existing ASID from password to certificate or from certificate to password. The section below describes the navigation and the process for changing the credential type of an ASID from certificate to password.

Note: Changing the credential type is a real time function; the changes requested are effective immediately.

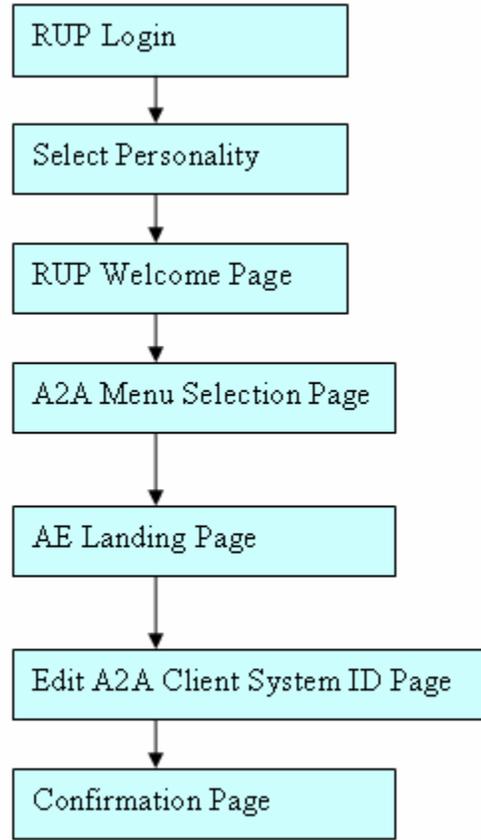
### 13.1. Prerequisites

In order to change the credential type for an existing ASID, the authorized delegated user must have the user credentials to log into the RUP Portal. In addition the user must have the role to access the AE application.

### 13.2. Navigation

The authorized delegated user logs into the existing RUP portal, selects a personality and clicks on the **Application to Application** link from the RUP Welcome Page. This takes the user to the A2A Menu Selection Page; from here the user clicks on the **A2A Client Application Systems** link to access the AE Landing Page. From the AE landing page, the user locates the ASID to activate and clicks on the **Edit** link under the Action column.

The Figure 13-1 Navigation to Change the Credential type to Password depicts the navigation for changing the credential type to password for an existing ASID.



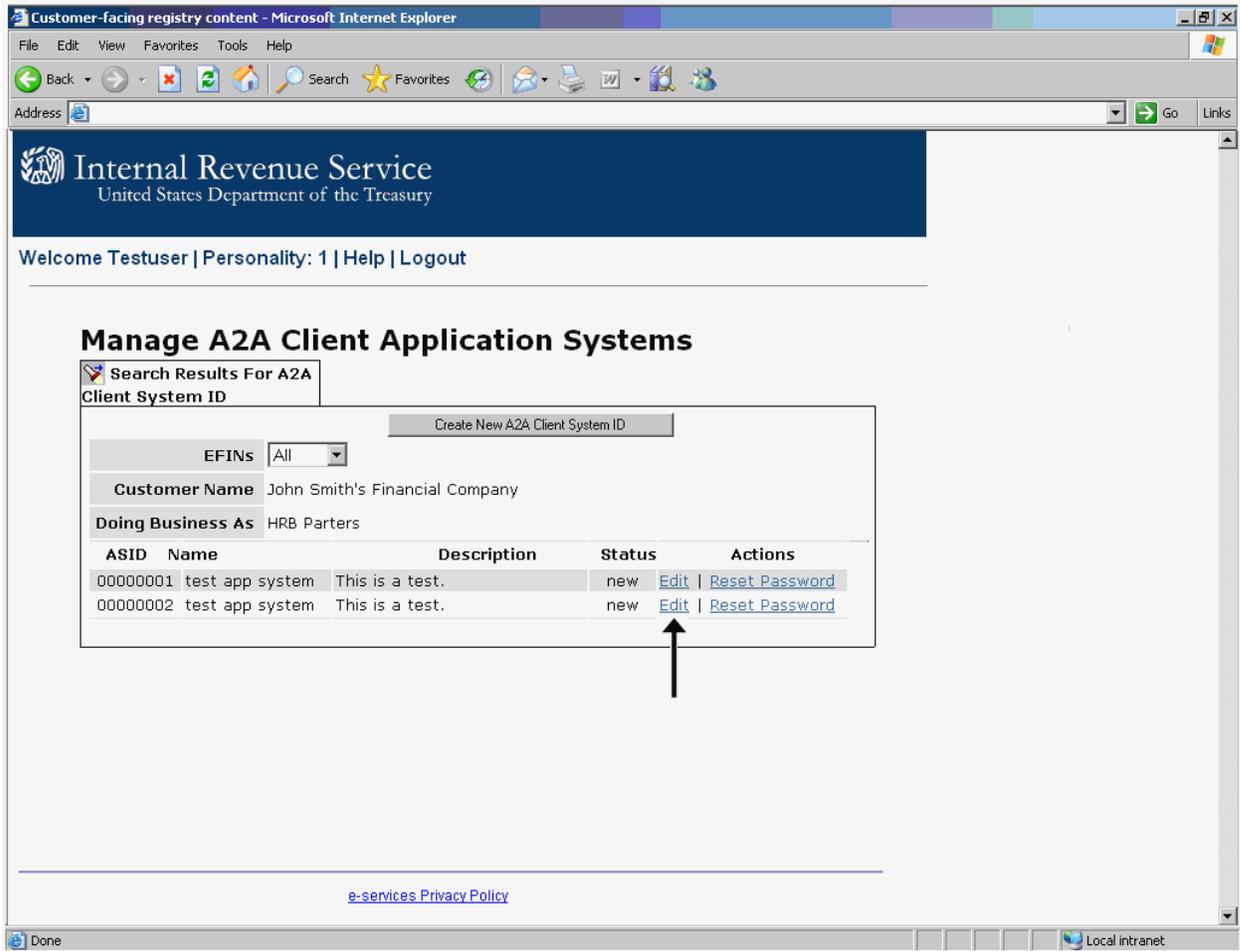
**Figure 13-1 Navigation to Change the Credential type to Password**

### 13.3. Required User Input

- **Credential Type:** The credential type can be password or certificate. In this case, the credential type of password needs to be selected.

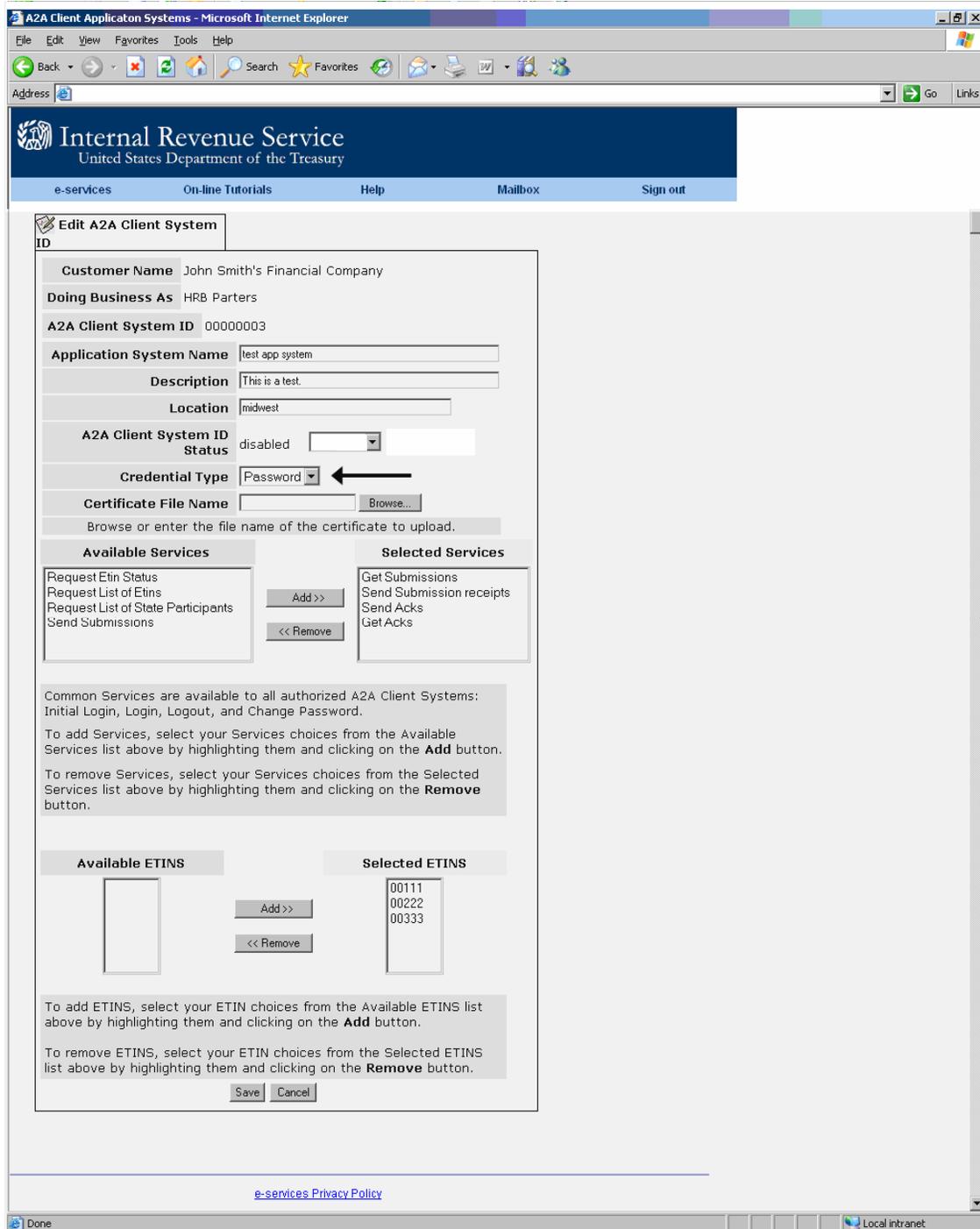
### 13.4. User Action

- Type the URL for the RUP Portal <https://la.www4.irs.gov/PORTAL-PROD/CRM/signon.html> into the browser.
- Enter a valid **user ID** and **password** to log in. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-4 RUP Login Page.
- Select a personality from the personality selection page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-5 RUP Personality Selection Page.
- Click on the **Application to Application** link from the RUP welcome page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-6 RUP Welcome Page.
- Click on the **A2A Client Application** Systems link from the A2A Menu Selection Page. Refer [Section 3.3](#) Registered User Portal Login, Figure 3-7 A2A Menu Selection Page.
- Locate the ASID and click on the **Edit** link under the **Action** column. The Figure 13-2 Accessing the ASID to Activate shows the ASID with the edit link selected for an existing ASID.



**Figure 13-2 Accessing the ASID to Edit**

- From the Edit A2A Client System ID Screen, change the Credential Type to password. The Figure 13-3 Changing the Credential Type to Password depicts the edit screen with the changes for the selected A2A Client System ID.



**Figure 13-3 Changing the Credential Type to Password**

- Click on the **Save** button to submit the request to change the credential type to password.
- The user has the option to cancel the request by clicking on the **Cancel** button. Clicking on the **Cancel** button returns the user back to the AE Landing Page.

### 13.5. Error Page

In the event of a system error, the user will be taken to an error page with the details of the error in red text. Follow the instructions on the screen and call the IRS Help Desk if needed with the details of the error message. Refer to Figure 13.4 AE System Error Message for Editing an ASID from [Section 6.5](#) for a sample error page.

**Note:** Clicking on the **Back** button from the error screen returns the user back to the AE Landing Page.

### 13.6. Confirmation Page

The confirmation page below is displayed if the request to change the credential type is successful. The confirmation page contains the following information:

- A2A Client System ID.
- Password.
- Text confirming the request was processed successfully.
- **OK** button. Clicking on the **OK** button returns the user back to the Search Results Screen. See Figure 13-4 Confirmation Page for changing the credential type to password.

Changing the credential type is a real time function. The changes requested are effective immediately. It replaces the credential type of the ASID to password and updates the certificate information with the new auto generated password.

**Note:** The delegated user must remember to invoke the web service request using the password and ASID displayed on the confirmation screen. Please note that the old certificate will no longer work.

The Figure 13-5 Confirmation Page for Changing the Credential Type to Password depicts the confirmation screen for changing the credential type to password for an existing ASID

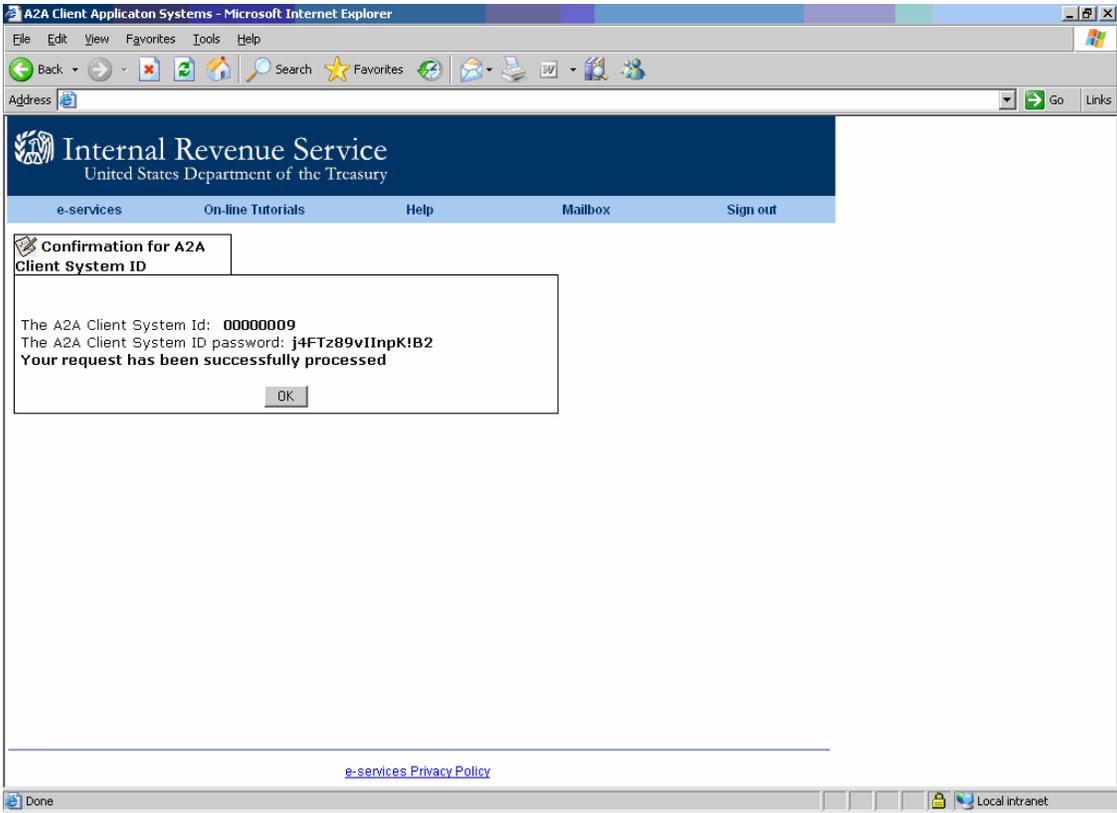


Figure 13-5 Confirmation Page

## 14. Abbreviations and Acronyms

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A2A	Application to Application
AC	Access Control
AE	Automated Enrollment
AI	Application Integration
ASID	A2A Client System ID
DBA	Doing Business As
Delegated user	Registered State or other Third Party Transmitter user
EFIN	Electronic Filer's Identification Number
ETIN	Electronic Transmitter Identification Number
IE	Internet Explorer
ID	Identification
ITI	Information Technology Infrastructure
IRS	Internal Revenue Service
MeF	Modernized e-File
MSSS	Middleware Support Services Section
RUP	Registered User Portal
UI	User Interface
URL	Universal Resources Locator